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ABSTRACT

This study is the second of a two-phase survey of public library information and referral (I&R) service. In this phase, seven public libraries offering I&R services were studied in depth to provide descriptions of their operations, organizational factors, and the reactions of their users. Organizational factors and operations were studied through available documents (relatively few) and interviews with 14 to 21 persons at each site. User reaction to I&R was studied by way of short user interviews conducted by the libraries' staffs after instruction by the study team. Sites were chosen to illustrate a mix of organizational configurations of the I&R service, of resource file formats (microform, cards, and computerized), of urban-suburban-rural settings, and of the I&R service role. In addition to the descriptions of seven instances of library-based I&R, general observations are offered, and include the following: (1) most I&R service consists of information provision, as opposed to actual referral; (2) computerization itself is not the absolute determinant of the nature of the service delivered; (3) commitment of top management and the magnitude of library resources deployed for I&R seem to be major determinants of the success of the I&R innovation; (4) I&R users include a relatively even mix of regular, infrequent, and non-users of the library; (5) the library is not often the place of first resort for people with I&R needs; (6) clients range demographically from lower socioeconomic through upper socioeconomic strata; (7) the promotion of I&R invariably increases the volume of traditional reference queries; and (8) staff seem to be generally positive toward I&R although often not in agreement as to what it consists of. Questionnaires and supporting data are appended. (Author/SD)

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FINAL REPORT

Project Number 475H900362
Grant Number G007900362

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PUBLIC LIBRARY INFORMATION AND REFERRAL PROJECT, PHASE II.

June 1981

Department of Education
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ABSTRACT

The study reported herein is Phase II of the two-phase survey of public library information and referral service. In Phase II seven libraries offering information and referral (I&R) service were studied in depth in order to provide descriptions of their operations, organizational factors and the reactions of their users. Organizational factors and operations were studied through available documents (relatively few) and interviews with from 14 to 21 persons at each site. User reaction to I&R was studied by way of short user interviews conducted by the libraries' staffs after instruction by the study team. Sites were chosen to illustrate a mix of organizational configuration of the I&R service, of resource file formats (microform, cards, computerized), of urban-suburban-rural setting, and of I&R service role.

Although the main purpose of this phase was to describe seven separate instances of library-based I&R, some general observations can be offered, if even tentatively: the vast majority of I&R service at all sites consists of information provision, as opposed to actual referral; computerization, per se, seems not to be an absolute determinant of the nature of the service delivered; commitment of top management and the magnitude of library resources deployed for I&R seem to major determinants of the success of the I&R innovation; I&R users include a relatively even mix of regular, infrequent and non-users of the library; the library is not often the place of first resort for people with I&R needs; clients range demographically from lower socio-economic through upper socio-economic strata; the promotion of I&R invariably increases the volume of traditional reference queries; and staff seem to be generally positive toward I&R although often not in agreement as to what it consists of.

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PUBLIC LIBRARY INFORMATION CENTER AND REFERRAL PROJECT PHASE II

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CHAPTER I

EXECUTIVE SUMMARY

CHAPTER II. INTRODUCTION TO PHASE II STUDY

Phase I of the Public Library Information and Referral Project, completed in July 1979, was a national survey that described the extent and nature of information referral (I&R) service in American public libraries. The definitions of primary and secondary component services of I&R developed for Phase I were used in Phase II. The purpose of Phase II was to describe in detail instances of I&R in seven American public libraries. In addition to covering the major points in Phase I, Phase II sought to identify, through a survey of I&R transactions in each of the sites, the types of people who use the I&R service and the kinds of queries posed.

The term "information and referral" is nebulous. Although the profession agrees that the mission of I&R is to get the client in touch with the entity that can best serve his needs, there is ambiguity over the concepts "in touch" and "entity." The following working definition of the I&R function was used: FACILITATING THE LINK BETWEEN A PERSON WITH A NEED AND THE SERVICE, ACTIVITY, INFORMATION OR ADVICE OUTSIDE THE I&R ORGANIZATION WHICH CAN MEET THAT NEED.

CHAPTER III. METHODOLOGY

This study consisted of two main parts: on-site interviews with staff in the seven libraries; and collection of data on I&R transactions in these libraries. The seven libraries were selected on the basis of the following criteria: locale target group, file format, I&R organizational structure and I&R role. Libraries were chosen so as to illustrate different profiles along these dimensions.

The Interviews

Between 14 and 21 people, randomly selected by the study team, were interviewed at each site. The following classes of staff were interviewed: director, head of I&R service, head of reference service, branch librarians, adult and children's service librarians, I&R back-up staff and I&R front-line or service staff. The questions, a combination of closed pre-coded ones and open ones, covered the following categories: origins and mechanics of I&R, service concepts and service provisions, finance, publicity, cooperation and impact of I&R inside and outside the

library. Pretests of the questions were done at Drexel University and at Baltimore County Public Library.

The Transaction Surveys

The purpose of the I&R transaction survey was to determine (1) the nature and extent of the use of the I&R service in the sample libraries and (2) characteristics of users of I&R services in these libraries. The survey instrument was designed to interfere as little as possible with the service process yet to gather information on the demographics of users, previous use of the I&R service, and topics and disposition of queries.

A sample of I&R clients or the total population, depending on anticipated volume of I&R queries, was interviewed at each site by library staff. The goal of 400 completed interviewers, or a large fraction of 400, was achieved at every site.

Training of the library staff for data collection was conducted during the site visits; data collection began immediately thereafter. Pretest of the survey instrument was done at Baltimore County Public Library.

Analysis

The data from the transaction surveys were manipulated using the Statistical Package for the Social Sciences (SPSS). Frequencies and cross-tabulations of the variables and a typology of the variables education and income were done separately for each site.

CHAPTER IV. MEMPHIS

Memphis and Shelby County Public Library and Information Center serves Memphis and Shelby County through a central library, 21 branches, two branches of the State Community College Library, four mobile units and several extension units. As of 1980 the system held 1.3 million volues, employed 430 staff members and was budgeted 15 $6.8 million.

The I&R service, named LINC for Library Information Center, was begun in the early 70's with a $368,000 grant in revenue sharing funds. Service is offered primarily out of the central library about 69 hours a week and is available by telphone, walk-in and write-in.

The resource file contains about 1100 resources maintained on 5 x 8 cards and arranged alphabetically by agency name. Access to the main file is augmented by a list of subject headings developed by the LINC staff. The resource file includes non-religious services offered by churches, clubs, associations and political organizations that provide services; recreational programs; governmental agencies; and service

agencies. Staff indicate satisfaction with arrangement, subject scope and depth of information, although some feel the need for more cross-feferences. In addition, staff turnover has made it difficult at times to keep the file up to date.

About 98% of all LINC queries come in over dedicated LINC phone lines. Queries take anywhere from 10 seconds to 25 minutes for response. When a query directed to LINC seems more appropriate to other library departments, it is referred to them. Efforts are made to coordinate LINC with other existing I&R services in the community.

LINC is administered by a professional social worker designated as head of the service and answering to the deputy director of the library system. Other staff include three professional librarians (one of whom is a cataloger), four library assistants and two clerical workers. Each new staff member undergoes a five-day orientation session. This is followed by a six-month probationary period during which they first observe, then progress gradually to listen in on transactions then to work one-on-one with another trained staff member then to work alone with a trained observer and, finally, to work independently. Weekly staff meetings and the "LINC Manual" reinforce training.

The estimated budget for LINC for fiscal year 1981 was $158,183 plus $2500 for telephone costs and $200 for printing expenses. The Area Agency on Aging currently adds $31,000 to cover some LINC expenditures. The total unrecovered cost for I&R for FY 81 was close to $130,000 expended from the regular library budget.

Publicity for LINC has included newspaper advertisement, radio and TV spots, flyers, brochures, and placards on buses, in addition to an open house held for agencies listed in the resource file.

While the top management of the Library is clearly enthusiastic and the staff as a whole acknowledge the significance of LINC, some staff believe it is not a legitimate library service. Widespread, though not deep, resentment of LINC for the extrodinary attention it has received is also evident. Efforts are under way to more fully integrate the LINC service with other departments and library services.

LINC staff collect information in both the on-going tally and occasional survey modes on a variety of topics, including number and type of query, mode of intake, service received or not received and client use of the service.

This survey found among other results that 3/4 of I&R clients have used other library services and 2/3 of these are "regular" users of the library. Most clients are between 20-35, the majority are female and 44% report a family income of under $14,000.

CHAPTER V. COLORADO SPRINGS

Pikes Peak Regional Library System serves the majority of El Paso County, Colorado, through a main library in Colorado Springs, nine branches (including a small branch in the El Paso County jail), two bookmobiles and a children's multimedia van. The fiscal year 1980 operating budget to support these facilities was $2,219,172.

In 1977 the Junior League, cooperatively with the Library, began to collect information on free or inexpensive services in the Pikes Peak area. A year later service to the public began under the name of "Citizens Action Line Limitless" (CALL). It was operated four hours a day by the Junior League. Also in 1978, the Library organized the Community Interaction Team(CIT), headed by two librarians and three CETA workers, in order to accumulate community information for library files by visiting social service organizations, government agencies, clubs, and educational and recreational organizations. Late in 1979 the work of CALL and CIT was consolidated and the Information Services Desk (ISD) was established at the Library. Online capabilities for the files were developed and as of 1980 five files became available:

CALL--human services and government resources

COURSES--adult education and recreation opportunities

CLUB--a roster of clubs and local organizations

CALENDER--a listing of educational, cultural, and recreational events inside and outside the library

DAYCARE--a listing of day care centers and homes.

The current goal of the Information Services Division is "to provide quick and efficient access to resources with the help of computers and selected sets of printed material."

The staff of ISD is divided into four teams. Three teams handle (1) CALL and CLUB, (2) CALENDAR and local business information and (3) educational and career information, including COURSES. In addition to team duties, staff work on the Information Service desk. The fourth team is responsible for designing new data bases and training for computer-assisted searching.

Referrals are made only about 3% of the time; the standard service is the provision of simple and complex information. Feedback is not provided, nor are counselling, transportation or escort, although people who seem to need the last three services are provided with appropriate information or referrals.

Nine branches (excluding the jail only) in addition to the Main Library,

have CRT terminals for online access to the ISD file. File access is available only through staff intermediaries, although printouts of CALL and C[illegible]B files are available for patron use without an intermediary and the COURSES file is available to home computer users. All five files are separate and have unique kinds of information, access terms and file structure. An Information Services Manual contains instructions and keywords for staff use.

The staff assessed the scope and the physical format of the files as very good. The currency was rated from very good to good; the main reservation about currency was that updating required more time than is available. While some of the staff rated the depth of information as very good, a few stated that the information was limited by the computer format and was not always clear. The adequacy of indexing was rated variously by the staff. While some judged it to be very good, others felt the keywords, especially for CALL, needed work in order to provide clear and consistent access.

The ISD desks and staff are highly visible to entering clients, giving a first impression of a series of airline reservation desks. The rather public and congested aspect of the area may have some chilling effects on the posing of complex personal queries in person. The consensus of the staff interviewed was that the majority of queries asked at the ISD desks call for short answers delivered quickly. Queries requiring more than the usual time to answer (2-3 minutes) are referred by paraprofessional to professional staff.

The Library's original Community Interaction Team activity was a major effort to gather community information and make it available to the public. As a result, the Library is highly visible in the community as an information place and now serves as a depository for city and county documents. In addition to good community relations, the Library seems to have a positive relationship with most other I&R services, although a few agencies feel that ISD competes with or duplicates their efforts. Non-I&R service agencies in the community seem to react positively to the library's I&R service.

The Head of Information Services is responsible to the Assistant Director of Public Services who in turn reports to the Director. Although part of the Information Services, ISD has a distinct staff consisting of four librarians, two technicians (one is part-time) and five CETA clerical workers. The Head of ISD provides training for all new ISD Staff, involving a general orientation to the services and personnel of the library, use of tools, and three telephone training sessions. New employees also have a session with a person in the Systems Office on terminal use, in addition to several "labs" in which they practice interviewing and using the terminal.

Funding for ISD and its staff is approximately $75,000 per annum plus $35,000 for CETA workers. These figures do not include charges for

building, telephone and computer use.

Publicity for ISD initially consisted of flyers and brochures in the library, television and radio spots and bumper stickers. The finances and management of publicity was handled by the Junior League and the Library's print shop. Ongoing publicity has included public service announcements and radio, and newspaper and television features. Librarians from ISD also speak to community groups about I&R.

There is a strong feeling among ISD staff that I&R is an appropriate job for a public library, although there was some initial resentment about money spent to establish ISD and the resource files. The Library's top management is committed to providing the public with the information it requires, in whatever form it is available. However, the separation of Information Service and Reference departments has created some problems in both departments in terms of defining their respective responsibilities. In order to alleviate such difficulties, management has begun assigning both ISD and reference staff to the three reference desks and ISD has been moved closer to the reference side of the building.

ISD regularly collects statistics on the number of directional questions, the number of information quieries that involve a search and the number of queries that come in by phone. The survey of ISD users found, among other results, that 86% of queries are by phone and the great majority of clients are women; the ISD files are used to respond to fewer than half the queries; and the staff rarely contact a resource on the patron's behalf.

The consensus among the staff and managers was that the major problem in ISD is the lack of permanent staff, since CETA workers change each September. Both ISD and reference staffs felt a larger, permanent professional staff would allow for more integration of the two services and a more even level of service delivery.

CHAPTER VI. DALLAS

The Dallas Public Library serves the population of Dallas through a central library and 18 branches. Construction of a new central building is scheduled for completion in 1982. The proposed fiscal year 1981 budget is about $8 million.

Dallas Public Library I&R began in the late 60's with the development of a small card file of groups concerned with social issues. In 1972 a staff committee report recommended that DPL should undertake a comprehensive I&R service. Also in 1972, the Greater Dallas Planning Council funded the development and publication of a directory of community resources. The Library was asked to do the work and in 1973 the

Directory of Urban Organizations in the Dallas Metroplex, a classified and indexed directory of between 1500 and 1800 organizations, was published. The following year a popularized version called Open Dallas was produced. The experience of developing, maintaining and organizing these directories provided the library staff with experience with large files of community resources and established the library as a credible overseer of such files.

In 1974-76, with the cooperation of the Dallas County Community College District, the existing files were put into computer format. The file was named APL/CAT (A Programming Language/Community Access Tool). APL/CAT services include production of Open Dallas editions, custom-made lists of resources, mailing labels, specialized lists, and answers to queries through microfiche access to the file.

In its earliest days, APL/CAT was oriented toward professionals, business and civic leaders, social planners, and the general citizenry for their use in solving the community's social problems and enriching the life of the community. It was designed to link formal and informal leaders among the citizenry to needed resources and thereby serve all people indirectly. The appearance of Open Dallas altered this orientation, since it was intended for use by the general population. However, the staff of the Library continued to view themselves as file builders rather than answerers of I&R queries. Today the staff continues to be ambivalent in viewing the Library as an I&R provider, even though the main use of APL/CAT is by people representing their own needs rather than the needs of a group.

Three I&R services are performed regularly by DPL staff: simple information giving; complex information-giving; and construction of a file for use by the public. The secondary services of advocacy, counselling, escort and transportation are not offered. Referral is rare.

The APL/CAT file is available at the central library and at three branches spaced evenly around the Dallas area. Public access to the file is either by telephone, walking in or--infrequently--by mail. The public may consult the file directly through the microfiche copy or indirectly through a staff member. The staff will ordinarily consult the fiche format. Staff at the central facility, when requesting custom-made lists of resources, may use one of two terminals that are tied on-line to the data base.

Entries in APL/CAT include the standard human service agencies, governmental agencies, non-profit enterprises, clubs and associations that provide community service, hobby and vocational interest groups, hard-to-find services or goods, and political and civic organizations.

On-line, the file is accessible by way of keywords, the name of the resource, or by broad class headings. The microfiche file is arranged in a classed order employing a modified United Way of America Services

Identification System I scheme. This arrangement is augemented by a controlled keyword index and an alphabetical index by agency name. Each resource is updated, usually by phone, at least once a year and a new fiche edition is issued every six months.

The file is currently purchased for use by ten outside organizations and libraries at $350 per year. Additionally, DPL uses the file for other reasons: identifying appropriate agencies for DPL deposit collections, community development work, sources of speakers and candidates for committees, and budgeting.

In aggregate, staff reaction to the APL/CAT file in its microfiche format is that the file is adequate, but in need of considerable improvement in order to be optimally useful, particularly in the areas of classed arrangement, keyword indexing and, to a lesser extent, currency, physical format, and depth of information.

I&R per se has a low profile at DPL and the continuing emphasis of the APL/CAT activity is on serving community leaders. Staff who actually provide answers to clients' questions are more likely to see their work as "reference work" rather than a combination of "reference" and "I&R." Despite the lack of prominence of I&R as a concept in DPL, I&R does occur in small proportions in the central library and fractionally in the branches.

The collection of information, maintenance of the on-line file, preparation and distribution of the microfiche editions, and publicity for the service are the responsibility of the Community Information Librarian along with two volunteers. The reference staff are responsible for dispensing I&R service. While some inservice I&R training is done, most staff experience comes out of "standard librarianship".

The original grant to DPL in 1972 from the Greater Dallas Planning Council was $12,000 to develop the file. Currently, the annual cost of APL/CAT support (excluding staff costs of directly serving the client) may be in the range of $60,000-$65,000. This does not include space, utilities, and other institutional resources.

Dallas Public Library I&R is modestly integrated with other DPL services. The staff who manage the APL/CAT file are distinct from the regular reference staff; but the reference staff provide most of the direct I&R service. Staff in the branches are by and large untrained in the use of APL/CAT and unoriented to I&R service.

No regular data are continuously collected about the use of APL/CAT or I&R service. Some informal sampling of the file was done by the staff on the number of queries, search strategy, and the topics of the queries. The PLIRP survey of APL/CAT users revealed, among other things, that about 75% of I&R clients have used other library services; inquiries by phone account for 93% of all inquiries for I&R, and education and

income of I&R users is slightly higher than at other sites.

While the top levels of management support I&R, it is not a high priority item. It is seen more as a tool than as a major direct service program. The prevailing opinion of the staff is that APL/CAT has had a beneficial effect on service at DPL in general and that it represents a largely unrealized potential. Although there is indication that some staff may be hostile to the idea of I&R, the dominant attitude is positive.

CHAPTER VII. AMHERST

The Jones Library, Inc., the Town Library of Amherst, Massachusetts, is a dual corporate entity: a private, nonprofit, tax-exempt corporation with an endowment and other assets, and the Library Services Department of the Town of Amherst. It is governed by six publicly-elected trustees who serve both the corporation and the Town Library. In Fiscal year 1980, the library budget amounted to about $306,000, including both endowment income (about 30%) and public funds. The library serves as an unofficial regional center for the surrounding smaller communities.

In 1972 the adult services librarian organized a women's group to put together a directory of services for women available to Amherst residents. At that time the library had the resources and the inclination to become more vital to its citizenry. This paved the way for building an I&R resource file, which began in early 1975, upon receipt of the first funds from an LSCA grant. The I&R service opened for business in July 1975 with the installation of two telephone lines.

From the outset, DIS was intended to serve all kinds of people in the Library's two-county service area. Since many of the human services listed in the DIS file are oriented toward people in need, there is an emphasis on such groups.

Service is available to clients in the two-county area in five modes: phoning the I&R staff at the Jones library; walking into the I&R office; using a published directory, All The Help You Can Get; writing in; or directly contacting a resource that has a copy of the published directory on hand.

The service has three phone lines--two local and one toll-free incoming WATS, all of which are independent of the Library's own phone lines. A three-way conference hook-up enables I&R staff, a client, and an agency to conduct a three way conversation.

The development of the resource file began with the initial grant in 1975. Although it was intended originally that the resource file be accessible on-line, funding exigencies prevented it. However, the computer language COBOL was used to establish programs for information storage and retrieval and for indexing the file, while SPSS and Fortran

were used to develop programs for providing detailed analyses of client queries. The taxonomy of the United Way of America Services Identification System was used to record service needs for analysis. Because of inflexibility, the COBOL programs were dropped after two years in favor of a manual system.

The resource file is in reality three interlocking files: a "facility sheet" containing a standard description of each resource; a back-up file of pamphlets, annual reports, and other publications on each resource; and the "subject" files containing both specilized files on such topics as housing subsidies, as well as lists of generic service providers, such as boards of health.

The files are in several formats: looseleaf sheets, rolodex file, 3x5 cards, and edge-notched cards. The files include about 1600 resources: formally recognized human service agencies, government agencies, churches, clubs and associations, non-profit organizations, for-profit organizations providing hard-to-find services, helping groups and individual experts.

In addition to I&R, the file has been used for training I&R workers, for job hunters, for student research projects and as a source of agencies that can supply films. The staff generally agree that the file is very good in terms of arrangement, scope, currency, and depth the of information. Problem areas are indexing and formating the resources manually, the multiplicity of indexes and the looseleaf format of the "facility sheets."

There is some sentiment on the part of I&R staff and the local United Way of America to reinstate a citizens advisory committee that was discontinued when the initial grant, which required such a group, expired. At the administrative level of Jones Library, it is felt that the existing public process of securing funding provides sufficient communication with citizens. External relations with other agencies are generally good since there is a fairly strong, though internal, network of I&R services in western Massachusetts and the library I&R is the only one that is generic--relatively unlimited in topic scope or target group.

The I&R staff are overseen by the Community Information Coordinator, who reports directly to the Director of the Library. The other I&R staff consist of two part-time associates, three part-time work-study students from nearby colleges, one full-time CETA employee and one or two part-time volunteers. Training new staff involves spending several hours in introduction to the files, I&R service concepts and the library/I&R configuration. Following that, the staff member begins actual work and on-the-job training. Since the staff are housed in a relatively small space, considerable sharing and informal supervision take place.

Start-up costs for I&R were $11,547 for space and utilities, computer programming, personnel, telephone, and supplies. Additionally, the

Board of Health donated the services of a CETA person, and the Amherst Community Resource Center staff donated time. The service is supported by revenue form the Hamphire County Commissioners, from Jones Library funds, from the United Way, sale of directories and in-kind support from Jones Library. The FY 1980 revenue was $38,200. Projected expenditures were $33,700, leaving an anticipated deficit of approximately $6,500.

Publicity for I&R is separate from other Library Publicity. One of the most effective means of publicity is the telephone book.

The service is a segregated activity within the Library, separated physically (located in the basement of the library); professionally (no DIS staff member has formal library training); and politically (to the extent that it is a regional service without regional funding). However, despite these potential sources of conflict between I&R and other parts of the library, there have been frequent instances of cooperation.

I&R staff regularly collect statistics on the various parts of I&R. The Transaction Survey found, among other things, that of all seven sites, Amherst claims the greatest number of first-time users (about 2/3); 39% of the I&R users were referred by other agencies, suggesting considerable support between the service and other agencies; and the I&R files were used to answer 97% of the queries.

Very little in the way of internal or management problems were expressed. Many staff, however, expressed a strong desire to see I&R and reference integrated, indicating such an integration would help alleviate some tension between staffs and the I&R funding problem. However, space limitations and the present political and funding situations may preclude full merger in the near future.

CHAPTER VIII. BALTIMORE COUNTY

Baltimore County Public Library (BCPL) is comprised of fourteen branches, four satellites, four mini-libraries and one bookmobile for service to institutions. There is no central branch for the system.

In 1978 and 1979 BCPL had the highest circulation per capita in the nation, even though previous research indicates that the demographics of the county normally correlate with low or moderate levels of library use. The high level of citizen use seems to be tied to the library's commitment to dispense materials that patrons request, not materials that librarians think they should request.

In December 1973, the Baltimore Regional Planning Council and Westat, Inc., produced a report, "Information Needs of Urban Residents," that pointed out the problems in meeting information needs of the citizenry. Shortly after the preliminary report was issued, the BCPL Information Services Committee was formed in order to review and recommend changes in BPCL's information services.

In summer 1974 an outside consultant, one professional and one clerical staff member established a central I&R clearinghouse. The major activities of the clearinghouse staff for the summer of 1974 were to develop procedures for collecting information and establishing a file, plan service organization and publicity, train branch professionals and clerical staff and recruit and train volunteers. Beyond the summer, the clearinghouse continued to act as the nerve center of the service.

Major planning ended in September 1974. A demonstration of the service was begun in one branch in February 1975 and I&R was implemented in all branches in June 1975. About this time the service was named Accurate Information Desk (AID).

While service was being planned and the files were being built in mid 1974 80% of the professional staff and selected clerical staff were exposed to two half-day orientation sessions. A month before I&R service began, a service workshop was held for the demonstration branch and near by branches to prepare the professional staff.

Forms for the collection and display of resource file information and for operational control of the files, as well as an index thesaurus, were developed in the first summer. Branch staff, aided by volunteers, collected local information for the resource file.

The I&R service in BCPL is highly integrated with reference service and is available directly at all full-service branches and through hot-lines at the mini-branches. It is supported by a central clearinghouse, whose staff maintain and distribute files and answer difficult queries.

The resource file in each branch contains about 2500 entries on 5x8 cards, augmented by a separate card index. The entries are updated at least once a year. Each branch maintains its own back-up file of ephemera that supplement the resource file. The staff generally approve of the scope, depth, currency, arrangement and format of the file, although several staff members expressed a preference for a microform format. The clearinghouse staff would like to see the file on-line for ease in updating and flexibility in data manipulation.

A client approaches the I&R service through the branch staff, since the clearinghouse is not publicized or visible to the public. The branch staff may use any directory in addition to the resource file to answer I&R queries. All sources at hand are exhausted before the clearinghouse is called.

Relations with other agencies providing I&R service are cordial, if not cooperative. The clearinghouse staff participate in the regional I&R planning council which includes the regional Health and Welfare Council, Enoch Pratt Free Library and a number of other public libraries. Cooperation from resource organizations is reflected clearly in a nearly 100% rate of return of requests for updated information. Since there is

little follow-up after referring a client to a resource organization (about 8%) receptivity to BCPL referrals is unknown. As a positive indicater, resources do accept the referrals.

The I&R service, along with tradional reference service, makes up the Information Services Department and is staffed by three professionals, one of whom is the head of the department, and two clerical workers. In 1978 I&R became nameless when the AID name was dropped and was merged with the general information-giving, including reference service. I&R is provided by all professional service staff and training is included in the general library orientation given to each new employee.

From June 1974 through March 1975, $54,000 of LSCA demonstration funding and $10,000 of BCPL funds covered all costs during planning, implementation and demonstration stages. In the second year about 40% of the $83,500 that was spent on I&R came from local funds.

On-going publicity consists of brochures, displays and book covers available at the libraries as well as two public service radio announcements, a slide/tape presentation, junior high and senior high school programs, and a regular column in the BCPL Report to the Reader.

Administrative support for I&R could be considered strong but not overwhelming. I&R is generally seen as an important component in BCPL's total package of information-giving services. However, the concern with ongoing I&R training and continued staffing of the Information Services Department are evidence that I&R remains a major interest of management.

Integration of reference, reader's advisory, library instruction and I&R into Information Services has given birth to the concept of the " Information Generalist." All public service professionals share responsibility for providing the whole program of information services to adults and children.

BCPL itself collects a number of different statistics on reference and I&R queries. In addition to these, the transaction survey found, among other things, that over 90% of I&R clients are regular library users; and in about 2/3 of the cases the "AID file" was used in responding to the client.

All told, the staff felt very good about how I&R is operating in Baltimore County. Support seems to come from all levels of management. The public are accustomed to the service and would likely miss it if it were removed.

CHAPTER IX. SAN MATEO COUNTY

There are eight autonomous public libraries with a total of thirty-one

outlets in San Mateo County. The largest library and the main focus of the study is San Mateo County Library (SMCL) with a central library, twelve branches and two bookmobiles. In 1970 the eight autonomous libraries formed a cooperative named the Peninsula Library System. PLS provides access to collections and services of all member libraries for the citizens of each community in the county, as well as providing services from a number of other institutions in San Mateo and other counties.

The Peninsula Library System I&R project grew out of several efforts in the early 70's to provide information and referral for the citizenry. "Information Consortium" (ICON) was the work of social workers, librarian, probation officers, and educators who worked on a volunteer basis to build an automated community information file for the county. Although the goal was never fully realized, application for LSCA funding grew out of ICON's efforts. The funding received from LSCA was used to develop a manual directory of people and organizations who were willing to help or give information, called "Inforama."

In 1974 another LSCA grant was obtained to develop a two-year I&R demonstration project: The Community Information Project (CIP). From the outset it was a computerized file utilizing the Stanford Public Information Retrieval System (SPIRES) and accessed by teletype machines already in place in 18 libraries throught PLS. In order to prevent overlap with "Inforama," emphasis for CIP was placed on human service resources.

The focus of the CIP project is on helping professionals and volunteers who work for the city and county governments and social service agencies, and all people with human service needs. While CIP service is available to the public through libraries, it is viewed by its managers primarily as a support service to agencies providing I&R to the public.

One full-time librarian worked for eight months, from December 1974 through August 1975, on initial CIP file development. Since then staff has been added and the file has grown from 130 to 1350 listings of government services, service agencies, political, civic and other non-profit organizations and certain for-profit organizations who offer services not available in the non-profit sector. The file can be accessed through a terminal by agency name, city name, area served, language spoken and keyword. In addition to access by teletypewriter, libraries have the option of directing clients to the CIP office or making a call to CIP on the client's behalf. Those libraries without teletypewriters have the same options, or may direct the client to a library with a machine.

The staff consider the subject scope of the file to be very good and its currency normally very high. However, updating has recently lagged.

In addition to CIP and Inforama, each library has its own local information

file. Staff in the branches of SMCL claim that the local information files are more responsive to the needs of their clients than are CIP and Inforama. This feeling seems to be verified by the proportional use of the files: 92% of all I&R type queries are answered by the local file, according to the Transaction Survey.

At the outset, the CIP Advisory Committee, consisting of the San Mateo County Librarian, one representative from an independent public library and the DLS Reference Coordinator, was appointed by the DLS Board. Serving in advisory capacities were representatives of human service organizations. There was no "grass roots" advisory group. External relations with resource agencies is very good, as evidenced by the 90-95% return rate for updating file entries.

While CIP has direct links to the member libraries in the Peninsula Library system, the director of CIP answers only to the director of PLS. The staff of CIP consists of the director (who has a social service background), a part-time professional librarian, a part-time clerk and a part-time CETA clerical worker.

The original 1974-76 LSCA grant provided $83,000; a 1976-77 extension added $30,000. All elements of set-up and first year service came from this money. Currently, for FY 1980 funds amount to $69,119, derived primarily from a county revenue sharing contract. Of this, about $500 a year is spent on publicity that includes radio and television announcements in Spanish and English, brochures to schools, and speaking engagements by CIP staff.

The majority of the staff of SMCL felt that while I&R is a natural component of full reference service, the limitations of their time and the hindrance of using noisy teletypewriters to tap the CIP file make it sensible to direct clients to the people most skilled in using the CIP file--the CIP office staff and non-library I&R services. Top management of SMCL feel that while I&R has a place in public libraries, Proposition 13 continues to have a deleterious effect on moral and staff time and severely limits the amount of attention the staff can give to anything other than established services.

The library keeps a tally of "reference transactions" consisting of all information transactions excluding directional ones. The CIP office tallies all searches of the computerized file including those done by PLS librarians and other remote searches.

Some of the findings of the transaction survey done in San Mateo County indicate that almost half the I&R clients claim to learn of the I&R service from the library staff, rather than from outside agencies or through publicity of the service; the proportion of men asking I&R queries is higher here than at any other site (47%); and the staff provide complex information giving in response to almost 1/4 of the I&R queries. Additionally, it was found that a call from an agency is more

likely to result in an actual referral by the library staff than is a call from an unaffiliated citizen; and the neighborhood topic is more likely to result in a referral than other topics.

CHAPTER X. CAROLINE COUNTY

Caroline County Public Library (CCPL), whose Central Library is located in Denton, was founded in 1961. It is a consolidated library system with one branch and one bookmobile. The library has a staff of nine, including two professional librarians and was operated on a budget of $151,000 in 1978-79.

In 1973 the Maryland Department of State Planning conducted the Multi-Service Center Study to evaluate the delivery of services by Maryland's state agencies. As a result of this study and others, in 1974 the Maryland State Department of Education, Division of Library Development and Services appointed a specialist in I&R to develop I&R in public libraries throughout the State. A grant by HEW in 1975 financed a project to demonstrate the provision of I&R through public libraries to residents of a three-country rural area: Dorchester, Wicomico and Worchester counties. The following year Caroline County replaced Worchester County as a demonstration site.

CCPL began collecting information for their resource file in November 1976. The following April the staff began using the file to answer I&R queries from the public.

When the three-country grant ended in July 1977, CCPL absorbed the salary of the community aide who helped provide for the smooth transition of CCPL into the project. CCPL then applied for and received an LSCA Title I grant for $23,000 in 1980.

The target group under the HEW funding was the general population. Under LSCA funding sub-targets have been identified: the aging, the handicapped, and agriculture-related organizations.

Currently I&R at CCPL is integrated into the regular reference work and the same staff provide both I&R and reference services. The file is available for use by agencies at no cost, as it is available to individuals. One of the major accomplishments under LSCA funding was the establishment of a community calendar as part of the I&R service.

A patron may access the I&R file in person, by telephone or by mail during regular hours of the Central Library. CCPL's one branch has no copy of the file and refers any I&R queries to the Central Library.

The main file is arranged alphabetically by service provider on 5x8 index cards. The separate subject index is also on 5x8 cards. Currently the main file contains about 925 entries; the subject index, about 530.

The file, which draws on resources not only in Caroline County but also in Annapolis, Baltimore, and other counties, is updated once a year. The kinds of resources included in the file are: churches, clubs and associations, entertainment and recreation, for-profit organizations that are not competitive and not listed in the phone book, non-profit and civic organizations and service agencies.

The staff generally assessed the subject scope of the file as very good, but the information specialist expressed the need for more entries in the file. Currency was rated as good, depth of information for all but the largest organizations was rated as very good. Arrangement, adequacy of access, and physical format were judged to be satisfactory.

The project staffs, both those involved with the earlier three-county effort and these working on the second project, seem to have been active in contracting organizations in the community such as churches, clinics, banks, and businesses. This level of outreach activity appears to have established a spirit of cooperation between the library and the resources in Caroline County.

During the period of HEW funding, the mechanics of I&R were separate from the library's other activities; thereafter they were integated with regular library activities. During the first grant period, the community aide was responsible to the State project coodinator as well as to the library hierarchy. Thereafter, the community aide became head of reference at CCPL and spent only part of her time on the file. She became a regular library employee and was responsible to library management. When she resigned in November 1979, the Library director became overseer of I&R service.

After the initial file development--from April 1977 onward--the staff were instructed in the structure and use of the file in a one-day session, followed by a series of question-and-answer sessions about the use of the file.

The most effective publicity proved to be the "drop-in"--regularly scheduled visits to "gatekeepers" in the local informal information networks. In addition to "drop-ins" publicity has included television features and spots, radio features, as well as posters, brochures, flyers and telephone stickers distributed inside and outside the library.

Initial resentment from some staff when I&R first started waned when the positive reaction fo the community to I&R demonstrated the need for it and as I&R was integrated into traditional reference work. Despite a few disagreements among the staff about the source and type of service given to clients with I&R requests, the total public service staff perceive the library as an appropriate place for I&R and seem to work in general good faith toward the provision of both I&R and reference service. Since I&R was introduced the staff feel the public's image of the Library has changed from a warehouse of materials to an information center.

The Library collects some data on I&R and reference services through the use of a "reference card" on which are recorded name, question asked, notes, etc. A monthly "Information and Referral Statistical Report" is prepared.

The Transaction Survey found, among other things, that agency calls in Caroline county account for a full 20% of all I&R transactions; about 65% of I&R clients claim to have used the service before. For the period March 6 through July 11, 1980, I&R type questions accounted for 28% of the total of "true reference" plus I&R queries. This proportion is the highest of al; sites studied. Among the factors that may contribute to this high percentage are that because the operation is small, staff may be more alert for I&R queries; and the CCPL definition of "ture reference" may be so narrowly written that the number of reference queries is lower than at other sites and, therefore, the proportion of I&R to reference is higher.

The major weakness in I&R as seen by the staff is the lack of training in content and use of the file, However,a general consensus was that the constituency wants and needs I&R and that is is likely to continue as a library program for the forseeable future.

CHAPTER XI. CONCLUSIONS

Library-based I&R, as observed in these seven sites, must be considered a service that provides information rather than referral, as defined for this study.

Library-generated resource files are used more than other files or directories in four sites to answer I&R queries; however, in three sites--all of which have library-generated resource files--<u>other</u> files and directories are used substantially.

While the I&R resource file is potentially an important determinant of the nature and quality of I&R service, no clear picture has emerged of its degree of importance. The same is true of the format of the file, especially the computerized format.

Main determinants of the quality and quantity of library I&R seem to be

- Commitment from top management
- Expenditure of library resources on I&R
- The extent of I&R outside the library
- How I&R service is perceived by the library staff
- The extent of orientation and training of library staff for I&R.

The proportion of agency calls to the libraries for I&R service ranges from 7 to 20%. It appears than that between 30% and 70% of the I&R

users could be considered regular library users. Human contact--friends, neighbors, relatives, library staff and agency personnel--is the main channel by which people learn of the I&R service. I&R users tend to approach the library as a last resort for their needs more often than as a first resort. Most I&R users fall into the age group of 20-35; most have some college education; most claim family incomes of more than $14,000 yearly; and most are women.

The promotion of I&R tends to attract additional quantities of traditional reference queries to the libraries, in addition to I&R queries. Few patterns in the topics of I&R queries were uncovered in the site surveys. In all sites the attitudes of staff toward I&R appeared to be generally positive. The I&R innovation has proceeded on the grandest scale, with greatest impact on the library organizaiton, in Memphis. At other sites the impact of the innovation has varied from substantial to negligible.

CHAPTER II

INTRODUCTION

This is the report of Phase II of the Public Library Information and Referral Project. Phase I,[1] completed in July 1979, was a national survey of the extent and nature of information and referral (I&R) service in public libraries. The data that resulted described for the first time:

- the forces that led to the initiation of I&R
- the kinds of services being offered as "I&R services"
- the human, physical and financial resources required to start and continue I&R
- the nature of commitment to I&R by staff and management
- the level of integration of I&R into the library structure
- the format and content of the library's I&R resource file

Phase II has had as its purpose to describe in detail instances of I&R in seven American public libraries. As well as covering the major points addressed in Phase I, in Phase II we sought to identify, through a survey of I&R transactions at the participating sites,

- the kinds of queries posed to the I&R service
- the types of people who use the I&R service, with special attention to disadvantaged people.

The overall rationale for the Project, both in Phase I and Phase III, has been to improve the information available to librarians with regard to I&R, so that they might make sound decisions on behalf of their individual libraries and, cumulatively, on behalf of the profession as a whole.

It has been evident in the literature of human services and librarianship, in informal conversations with librarians and I&R personnel and in responses to the questionnaires of Phase I that the term "information and referral" is nebulous. Even those people who purport to perform I&R see the job in differing ways. There seems to be fairly widespread agreement that the mission of I&R is to get the client in touch with the entity that can best serve the client's needs. Definitional ambiguity arises over the concepts of "in touch" and "entity." That is, through what means does I&R help the client get "in touch," and with what "entity"? Based on the observations of Phase I and Phase II, we could advance a broad statement of I&R function that will likely meet with little opposition: FACILITATING THE LINK BETWEEN A PERSON WITH A NEED AND THE SERVICE, ACTIVITY, INFORMATION OR ADVICE OUTSIDE THE I&R ORGANIZATION WHICH CAN MEET THAT NEED.

In Phase I, in order to determine whether or not the sample libraries were in fact providing I&R service, the component services of I&R were presented to respondents. These same definitions were used in Phase II to clarify the I&R activities in each of the site libraries. They are used throughout this report as follows:

Primary I&R Services

Without at least one of these, a library is considered, ipso facto, not to be providing I&R at all. All site libraries were in part chosen because they were engaged in at least two of the component primary services.

Simple Information-Giving. Providing the client with requested information about outside resources, such as address and phone number, without further probing.

Complex Information-Giving. Giving the same information as above after probing to determine the client's real underlying need.

Referral. Actively helping the client make contact with an outside resource by making an appointment, calling an agency for him or her, etc. (Note: This special meaning for the term "referral" is used throughout the report. Where we discuss the process of telling a client about a resource to turn to, the terms "information-giving," "steering" or "directing" are used.)

Constructing a Public Resource File. Constructing a file or directory of outside resources and making it available for the client to consult on his or her own.

(Note: Important in this definition is the word "Public." Preparing a resource file upon which other I&R component services is based does not, per se, qualify as a service. Preparing a file and then making it publicly accessible -- as a pamphlet, a directory, a card file, an on-line base, etc. -- is a public service.)

Secondary I&R Services

These could be considered adjunct to, or further amplification of, the primary services.

Advising: Resources. Providing the client with evaluations of outside resources.

Advising: Strategy. Helping the client choose a course of action to reach or obtain needed resources.

Follow-up. Making sure the client has reached the proper outside resources or has gotten appropriate help.

Advocacy. Working to overcome obstacles that the client encounters in trying to secure help from outside resource agencies.

Feedback From the insights or data gained through I&R services, providing formal feedback on social service or other community needs to politicians, planners, social agencies, etc.

Counselling. Helping the client work out personal problems (without necessarily using outside resources): often requires deep probing of a complex personal situation such as alcoholism, emotional crsis, family disputes, etc.

Transportation. Providing -- not simply arranging for -- transportation for the client to outside resources.

Escort. Providing -- not simply arranging for -- someone to accompany an inquirrer to outside resources.

ENDNOTES

1. Childers, Thomas. Public Library Information and Referral Project: Phase I, Survey. Final Report. Washington, DC: U.S. Department of Health, Education and Welfare, Office of Libraries and Learning Resources, October, 1979.

CHAPTER III

METHODOLOGY

The objectives of Phase II were (a) to describe, in detail, the organization and operation of I&R services in public libraries with different profiles and (b) to collect quantifiable data on users of these libraries' I&R services. The study consisted of two main parts: on-site interviews with staff in the seven libraries and collection of data on I&R transactions in these libraries. The interviews and the transactions surveys resulted in case descriptions of the seven libraries (Chapters IV through X).

SELECTION OF LIBRARIES

On the basis of the data collected in Phase I and professional contacts of the project director, seven sites were selected for the case studies. The intention was to select seven libraries each with different configurations of I&R service. Five criteria were identified by which to distinguish candidate libraries. The criteria were considered to be the most discriminating variables for use in developing discrete models of public library I&R service. The criteria were:

Locale: Urban, Suburban, Rural
Target Group: Disadvantaged, General
File Format: Conventional, Computer-based
Concentration of I&R: Central branch, All branches, Selected branches
I&R Role: Direct I&R service, Support service to other agencies

Exhibit III-A shows the profile of each of the libraries selected for the study, as determined from information collected from each library by phone before the onset of data collection. While the precise classification of certain libaries on certain of the variables might be debated, it is clear that each library has a profile different from any other library in the group.

THE INTERVIEWS

As a result of discussion with the directors of several libraries and our experience in the field test, the following classes of staff were identified for interviewing at each site: Director of the library, head of the I&R service, head of reference service, branch librarians, adult and children's services librarians, I&R back-up staff and I&R front-line or service staff. The people interviewed were selected randomly by the study team from a list of all staff in those categories. Between 14 and 21 people were interviewed at each site. It was originally proposed that we interview one trustee and one member of local government about the I&R service. Contact with Baltimore County, however, persuaded us that this could (1) disturb a library's fragile political relations with the governing authorities and (2) yield relatively little insight into the workings or importance of I&R. Therefore, these classes of interviewees were dropped from the study design. However, in most sites, where the libraries had a referral relationship with outside agencies, telephone interviews were conducted with staff of those agencies. Interviewing was structured by way of a schedule that was custom-

	LOCALE			TARGET GROUP		FILE FORMAT		I&R SITE			I&R ROLE	
	Urb	Sub	Rur	Disd	Genl	Conv	Cmptr	Ctl	All	Sel	Sppt	Dir
Amherst MA			x		x	x		x			x	x
Baltimore County MD		x			x	x			x		x	x
Caroline County MD			x		x	x		x				x
Dallas TX	x				x		x	x		x	x	x
Memphis TN	x	x	x		x	x		x			x	x
Pikes Peak CO	x			x	x		x	x			x	x
San Mateo CA		x	x		x		x			x	x	x

Exhibit III-A. SITE PROFILES

designed for each type of interviewee. Impromptu questions were posed, as appropriate. The following chart delineates the broad categories of interview questions and the staff to whom they were generally directed.

Category of questions	Types of staff
Origins of I&R	Director or assistant director Head of I&R
Mechanical: record-keeping and file development and use	Head of I&R I&R providers I&R Back-up
Service concepts and provisions	Head of I&R I&R providers
Financial	Director or assistant director (if appropriate)
Publicity	Head of I&R Public Relations officer (or appropriate staff member)
Cooperation with resource agencies, other staff and the public	Head of I&R I&R providers Public Service librarians (adult, childrens, branch librarians)
Impact of I&R on staff, the administration, the library organization, resource agencies and the public	All staff Director Head of I&R Outside resourcesagencies All staff, our transaction survey

Questions were a combination of closed pre-coded ones and open ones. The interviews lasted from 1/2 hour to four hours. It should be repeated that that staff interview questions were used as general guides for conducting the interviews; each interview had to be tailored to the individual and to the local situation. See Appendix A for a complete list of questions.

THE TRANSACTION SURVEYS

The purpose of the I&R transaction surveys was to determine (1) the nature and extent of the use of the I&R service in the sample libraries and (2) characteristics of users of I&R services in these libraries. To our knowledge, this information has never been gathered and reported by any library.

Ideally, it would have been preferable to interview clients on a random sampling basis over a year in order to infer to the population of all users and all I&R queries. However, the constraints of a library's total volume of I&R queries and the time limits of this study did not permit sampling in this way. It was therefore decided to identify a period of time during which the transaction survey would be conducted at each site and, depending on the anticipated volume of I&R queries, either interview a sample of clients or the whole population of clients during that period. The surveys generated data about transactions that took place within a limited period of time. Therefore it would be best to consider the data from the surveys to represent only those transactions from which they were collected. They are not generalizeable to other times of the year. Nor are they generalizeable to other libraries.

A goal of 400 completed interviews was established as a desirable number for each site. It was the research team's opinion that this number would yield sufficient data for statistically valid tests of associations among the variables. In most cases the goal of 400 completed interviews, or a large fraction of 400, was achieved. In libraries with high I&R volume this accomplishment took several days; in libraries with infrequent I&R queries, it required several months. Additional details about the method of the survey in each site will be found in the respective chapters, IV through X.

In essence, the data are "bench mark" data -- comparable from site to site, not generalizeable to other libraries or time periods, but replicable for future comparisons.

The transaction survey form is displayed as Appendix C. In developing the form, there was considerable attention paid to inventing an instrument that would interfer with the service process as little as possible. It was only by using a brief survey instrument that the staff at the sites would be able to interview up to 400 clients during busy and slow periods of service.

The transaction survey form was modelled on the user interview form used for the Neighborhood Information Center project done in 1975.[1] Information on the client's age, education and total family income were ascertained in order to construct a socioeconomic profile of I&R clients. The interviewer (service provider) filled in information on the topic and disposition of the question, whether the resource file was used, and the user's mode of inquiry.

A major limitation was evident even before the instrument was pretested: Discovering whether or not the client had made prior use of the I&R service may be impossible, inasmuch as we found no satisfactory way to distinguish

I&R from other information-giving services with any degree of reliability. Our experience during the interviewing of both staff and selected clients has confirmed our conviction that distinctions between I&R and other information-giving are drawn differently, and with varying degrees of firmness by each individual -- whether staff or client. It must be remembered, then, that in all analyses of transaction data, conclusions must be drawn from the first question of the interview schedule with great care.

Collection of data on the I&R transaction was originally planned for a common ten-week period in March, April and May 1980. We subsequently decided that having a common data-collection period for all sites had few advantages (the comparability of the data from library to library is only slightly improved, for instance) and a significant disadvantage (for the sites where training in data collection came early in the project, the actual collection of the data would lag so far behind training as to make the training useless). The final plan was for each site to begin collection of data immediately after interview visits. See Appendix E for the schedule of on-site visits and dates of the transaction surveys.

TRAINING FOR DATA COLLECTION

At the end of the interviewing visit at each site, a training session was held with all staff who were involved in answering I&R queries and therfore would be conducting transaction surveys. The purpose of the session was to set guidelines for defining an "I&R query," to go over each question on the form, and to allay any of the staff's fear in asking demographic questions.

Before each site visit, the staff who were to attend this meeting (and therefore be involved in data collection) were asked to bring examples of I&R queries and their disposition. Using examples of queries enabled the staff and the research team to clarify together the definition of "I&R" and the meaning of the questions on the survey form.

PRETESTS

The staff interview questions were pretested the first time through role-playing at Drexel, using students and faculty. The second pretest was a field test conducted in Baltimore County, one of the seven study sites. There the staff interview questions were pretested a second time, and the transaction survey form and related instructions and the I&R query tally (for Baltimore County only) were pretested their first and only time.

DATA ANALYSIS

The data from the transaction surveys were manipulated using the Statistical Package for the Social Sciences (SPSS). Frequencies were run on each variable, and a total of 498 crosstabulations were generated for each site. Crosstabulations that yielded a chi square at a .05 level of significance or better were examined in order to explain relationships among the variables.

In addition to the simple variables derived from the transaction survey form, the variables educational level and family income were combined to create a composite variable called "status." The two variables were each transformed into binary scales and then permuted. Thus, educational level was divided into "low" (high school graduate and below) and "high" (some college and beyond). Income was likewise divided into "low" (up to $14,000) and "high" ($14,000 and above). Therefore, the variable "status" has the following values:

		Educational Level: Low	Educational Level: High
Family Income	Low	high school graduate and below; up to $14,000	some college and beyond; up to $14,000
	High	high school graduate and below; $14,000 and above	some college and beyond; $14,000 and above

The frequencies for all the variables for all the sites are presented in Appendix D.

ENDNOTES

1. Childers, Thomas. Third Year Continuation of a /Program to/ Research and Design Criteria for the Implementation and Establishment of a Neighborhood Information Center in Five Public Libraries: Atlanta, Cleveland, Detroit, Houston and Queens Borough. Final Report. Washington, D.C. : U.S. Dept. of Health, Education and Welfare, Office of Libraries and Learning Resources, November 1975.

CHAPTER IV

MEMPHIS

A. THE SITE

MEMPHIS

Memphis is a city of 700,000 people situated on a bluff overlooking the Mississippi in the southwest corner of Tennessee. It is the 14th largest city in the United States, the largest in Tennessee, and is considered the "capital" of the six-state mid-South, a region of 2.7 million people. The Memphis Standard Metropolitan Statistical Area (SMSA), encompassing Shelby and Tipton Counties in Tennessee, Crittendon County, Arkansas, and Desoto County, Mississippi, contains about 900,000 people. While the area experienced reasonable growth during the 50's and 60's, as a whole the SMSA has grown modestly in the 70's (.8% per annum).

Memphis is the second largest inland river port on the Mississippi. It is also the center of a thriving agricultural region, including not only agricultural production, per se, but also processing, sales and distribution activities associated with agribusiness.

The population of the Memphis area tends to be somewhat younger than the national population and formal education tends to be somewhat less (11.6 years in 1970, compared to 12.0 years nationally). The ratio of black to white residents in 1970 was roughly 4:10 throughout the SMSA, and there seems to have been little change in subsequent years. There is a sizeable poor population in the region, as suggested by the 1970 per capita income in the Memphis SMSA of $2,731 (compared with a national figure of $3,911).[1]

THE LIBRARY

The Memphis and Shelby County Public Library and Information Center (MSCPLIC) serves the area of Memphis and Shelby County through a central library, 21 public library branches, the two branches of the State Community College Library, four mobile units, and extension service at several regular sites. At the end of Fiscal Year 1980, MSCPLIC held a total of 1.35 million volumes, plus an additional 42 thousand in the Shelby State Community College Library. The staff numbers 430. The total budget for Fiscal Year 1980 is $6.8 million and derives primarily from real estate taxes levied roughly equally on the city and county residents. The director of the library is responsible to the Board of Trustees, an autonomous body appointed by the Mayor.

B. ORIGINS OF I&R

In the early 1970's "and Information Center" was added to the name of the Memphis and Shelby County Library. Information service to adults -- as opposed to book service, or service to children -- was made the top priority among library services. During this period MSPLIC's director and assistant director were becoming aware of the Neighborhood Information Center Project and especially of the I&R activities taking place in the Detroit Public Library as part of the Project. [2] The library began a modest project of compiling information about the various community services and groups as time allowed. In 1974 the director learned through the president of the local American Association of Retired People that $1,000,000 in revenue-sharing funds was about to become available to the region. The local AARP president, the director and assistant director of MSCPLIC wrote a proposal for a computer-based I&R system centered at the library and costing $999,404 for a two-year period. The local United Way submitted an almost identical proposal. Other social service groups also submitted proposals for the $1,000,000. The Shelby County Quarterly Court, which was to make the award, finally decided to make three awards rather than one and to split the money evenly among MSCPLIC and two other agencies. The United Way proposal was denied, apparently losing out to MSCPLIC on the basis of rather weak past performance in its I&R activity. The final amount granted to MSCPLIC was $368,000 for two years, and the proposal was rewritten to exclude the computer from the plans.

The grant was secured by April, 1975. Bob Croneberger and Carolyn Luck, the team that had developed the well-known I&R system at Detroit Public Library, called "TIP" (The Information Place), joined MSCPLIC as full-time consultants in June. Their job was to plan the development of I&R, set up procedures and select staff. The development of LINC -- Library INformation Center -- began. By late summer their consultancies had turned into regular jobs: Assistant Director for Public Services and Head of LINC Department, respectively.

LINC, then, grew out of the general commitment of library staff to the idea of information service to adults, the awareness of top management to I&R activities in other libraries, the availability of $368,000 and the hiring of two key staff who were at the time probably the most experienced in library-based I&R in the country.

A fuller chronology can be found in the Annual Report for 1975-76:

> May 28, 1973
>
> The Director's Memo stated that...(1) the preparation of a written proposal for a full-scale information/referral center...be presented first to the City Administration where

most of the funding would probably be found; and (2) a Committee of Community Resources Specialists be formed.

October 18, 1973

At the first meeting of this committee, composed of one staff member from each branch and department, the group was asked to work on the following projects:

1. Establish a master community resource file on all agencies, clubs and organizations in the metropolitan area.
2. Set up in-service training of staff on the functions of all these community agencies.
3. Arrange visits to agencies.
4. Keep current the literature of the agencies.
5. Explore the possibility of offering space to selected agencies.
6. Develop packaged programs for branches.
7. Conduct a Public Relations campaign about information service when above steps have been completed.

December, 1974

The proposal for establishing and operating a central information and referral center for Shelby County was written and submitted to the Shelby County Quarterly Court.

April 15, 1975

The Court voted to fund a two-year grant of $368,000 for the project.

May 5-7, 1975

Ms. Carolyn Luck and Mr. Robert Croneberger from Detroit Public Library's I&R project came to MSCPLIC to serve as consultants in the beginning stages.

May 8, 1975

A public meeting was held in the Main Library to which agencies were invited in order to hear the library's plans to implement I&R service and to provide agencies an opportunity to ask questions.

June 2-13, 1975

Ms. Luck and Mr. Croneberger began first training session of staff. This continued from June 23-July 3. (A five-day pre-service training program.)

August 4, 1975

Carolyn Luck began full-time responsibilities as Assistant Director of I&R Service.

September 1, 1975

Robert Croneberger began full-time responsibilities as Assistant Director for Public Services.

September-October, 1975

Training of the remainder of the staff completed.

October, 1975

The acronym, LINC, for Library INformation Center and for linking people and services, was adopted for the new I&R service.

December 1, 1975

LINC desk at Main Library was opened and began providing service.

January 19, 1976

LINC service began officially system-wide.[3]

C. I&R SERVICE CONCEPT

Although the original proposal promoted I&R as a service for disadvantaged people, this focus was abandoned as soon as work on LINC began. It was actually designed to reach all segments of the population: "LINC is for everyone." However, under recent contracts with the Area Agency on Aging, LINC has formal responsibility to provide I&R related to senior citizens and their concerns. Also, LINC staff are providing some special assistance to other agencies that are trying to reach the handicapped and the poor. In the future it is planned to try to target topics -- such as job training or social security benfits -- rather than groups, per se. Despite these special foci, however, the general population remains the target of LINC's service.

The I&R service was originally conceived in as an information service that would direct the public to human services available in the region, on demand. The service would rest upon a computer-based directory of such services, maintained by the library. The proposed service was not detailed any further. Before initial funding of the project, as reported earlier above, the computer feature was dropped in favor of a manual system for maintaining the directory.

Compared with most other sites, LINC provides a rich array of I&R services. The relatively routine primary services -- providing simple information and complex information, and maintaining a resource file for public use are included, of course. In addition, the staff regularly provide actual referral (primarily calling agencies to verify information or/refine the referral; rarely to make appointments for clients). They advise courses of action for acquiring needed services. They follow up. They help the client overcome obstacles that he or she encounters in trying to secure help. This usually consists of piercing the jargon and red tape of the agency and negotiating the needs of the individual vis-a-vis the services of the agency. Moreover, LINC staff sometime provide evaluations of outside resources to the client, depending on the staff member's inclinations; and they do provide, informally and usually only when requested, feedback to some resource agencies.

In conjunction with the Human Services CO-OP of Memphis State University, the staff also publish LINC's Latest, a monthly newsletter that serves to update information about resources and community activities. It is distributed throughout the library and to resource organizations in the region and is subsequently incorporated into Sharing, a publication distributed to service agencies in the region by the Memphis State University Human Services Cooperative. See Exhibit IV-A.

LINC'S LATEST

LINC'S LATEST, provided by the information and referral service of the Memphis-Shelby County Public Library and Information Center in cooperation with the Human Services CO-OP of Memphis State University.

THE DEADLINE IS MAY 15th!!!

REMINDER

for listing your agency's summer programs in LINC's summer activities packet. This month's camps list is part of the packet. Don't be left out - call Debbie Boots at 528-2999.

State Technical Institute at Memphis, 5983 Macon Cove, is sponsoring a Community Agency Day Fair on May 16 from 8:30-1:30 in the Nabors Auditorium. For further information contact Eunice George, 377-4104 or Maxine Ford, 377-4223.

***** ***** ***** *****

Look Before You Bite (A Guide to Diet Planning for Hyperactive Children) was prepared by the Butler County Association for Children with Learning Disabilities and is available for $2.50 from ACLD, Inc., 4156 Library Rd, Pittsburgh, PA 15234.

To get information of general interest to the human services community in LINC'S LATEST, call 528-2990.

Exhibit IV-A. LINC'S LATEST, Memphis.

MEDICAL SOCIETY
774 Adams Avenue
Memphis 38105

PHONE: 526-8288

SERVICES: 1. Makes referrals to physicians who are members of the Medical Society. This includes giving the names of specialists (e.g., pediatricians, gynecologists, obstetricians) and the geographic area they are located in.

2. Accepts and attempts to resolve complaints about physicians who are members of the Medical Society. All complaints must be submitted in writing. In cases where the complaint centers around a physician who may have a drug or alcohol problem, the Medical Society refers the case to the Impaired Physicians Program of the Tennessee Medical Association of which the Society is an affiliate.

COMMENTS: The Medical Society can only accept complaints about physicians who are members of the Society. In all other cases, the complaint must be sent directly by the patient, in writing, to the Tennessee State Licensing Board for the Healing Arts.

3. Provides medical information through speakers and programs. Arrangements must be made at least eight weeks in advance. Programs may include films or slides, and inquiring groups may be required to provide audio visual equipment.

ELIGIBILITY: Anyone.

HOURS: 8-4:30, M-F.

FEES: None.

DIRECTOR: L. H. Adams (Executive Secretary)
Dr. James Theodore Galyon (President)

COMMENTS: The Society does <u>not</u> have a list of physicians who accept Medicaid.

SUBJECT HEADING: 1.Physicians - Associations.

MEDICARE PRGRAM see SOCIAL SECURITY ADMINISTRATION (SSA) (U.S. GOVERNMENT)

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Exhibit IV-B. Entry from the <u>Directory of Human Services</u>, Memphis.

As an auxiliary service to the live LINC service, the library publishes the Directory of Human Services in Memphis and Shelby Fayette, Lauderdale, and Tipton Counties. The latest edition was published in April, 1980, with the nominal cooperation of the United Way of Greater Memphis, and is distributed free to all agencies listed and any other human service entity. An example of an entry from the Directory is displayed in Exhibit IV - B. The LINC staff have also assisted other agencies in providing I&R by helping them set up and collect data for their own agencies' resource files.

LINC service is offered primarily out of the central library. While all branches have copies of the complete LINC resource file and all public service staff were exposed to the same initial five-day orientation, the lion's share of LINC-type queries are processed through the LINC desk at the central library. This is felt by some members of top management to be a satisfactory arrangement, in part because Memphis, as a medium-size city, permits fairly easy access to the central library facility; and in part because the library system in Memphis is a "strong-central/weak-branch" type of system and the central library was therefore in a better position to absorb the shock of a major innovation.

There appears to be interest in increasing LINC activity in the branches, or in selected branches. However, serious efforts at decentralization will probably await the assignment of another full-time person as coordinator of LINC in branches. For the time being, the service is provided on a limited scale in some of the branches.

The major LINC outlet is the LINC desk, located on the second floor of the central library, away from the other reference activities of the library. The LINC desk and phones are open from 9 to 6, five days a week. To extend the hours of LINC service, LINC staff work evening and weekend hours at the Science Business and Social Science Reference Department. The LINC files are moved there with them and they -- and sometimes the regular Science Business and Social Science staff -- handle LINC queries. The real number of hours that LINC is available, then, total 69 hours per week.

LINC is available through telephone, walk-in, and write-in modes. There is some consideration being given to automating LINC, after the automation of other library processes (circulation and technical services). It is most likely that the automation of LINC will enhance the support of the LINC services, rather than add to another mode of access for the client. The staff currently are anticipating savings in updating time and preparation of the Directory when automation does arrive. At the moment, copy for the Directory is generated on a Wang word processor. The processor is not used for direct access by either staff or public.

D. THE RESOURCE FILE

The first beginning of the resource file occurred in 1973, when the library began developing a "master community resource file on all agencies, clubs and organizations in the Metropolitan area." The file grew slowly, however. The second, and real beginning of the file happened after the LINC project was funded in mid-1975. With a staff devoted to I&R, there was the time to establish procedures and forms, as well as time to gather the information itself. Drawing from the Detroit experience, it was decided to assign only LINC staff to collecting information for the file, rather than involving other library staff. The LINC staff at that time included the two Detroit consultants, two librarians, one library assistant, and two clerks. By December 1975 they had assembled a core file of 350 resource entries. LINC was ready to open for business.

The main file today contains approximately 1100 resources. It is maintained on 5x8 cards filed alphabetically by the name of the agency. The information on a card for a given resource usually includes:

Name, address, phone number of the resource
Description of services or activities
Person to contact and person in charge (name and title)
Terms of officers
Hours of services
Geographic area served
Eligibility requirements and how to obtain services
Physical accessibility of the resources
Meetings of, or sponsored by, resource
Speakers and published materials available
Subject headings

Access to the main file is augmented by a separate index, also on 5x8 cards. The index is based on a thesaurus, or list of subject headings, that has been developed by LINC staff. The thesaurus was initially influenced by the one that had been constructed at Detroit Public Library; also, it incorporates Library of Congress rules when appropriate. Three salient features are:

. They have attempted to balance the language of the layman and the language of the human service professional. Sometimes they have opted for the language of the human service professional ("Protective Services - Youth" rather than "Child Abuse"). Sometimes they have chosen the language of the layman ("Runaways" rather than "Runaway Youth").

Their objective in the index is clarity. Common language is used in lieu of human services language or language of the media where the latter two are thought to be too technical or confusing.

- The system of filing and arrangement should be open, so that changes are easy to effect.
- No pejoratives or "victim language" should be used ("Single Parent" not "Unwed Mother").

As reported by the administrators closest to LINC operations, one of the best decisions at the outset was to transfer to LINC one of the best of the library's cataloging staff. She has been integral in refining the thesausrus and the indexing of resource file entries, which in turn have been key factors in building a resource file that is responsive to clients' needs, relatively easy to use by library staff and consistent.

A resource file entry, an index card set and a page from the LINC thesaurus are displayed in Exhibits IV-C, IV-D and IV-E.

A copy of the resource file (main file plus index) is kept in a row of agate boxes on a booktruck. The copy is for training LINC and other library staff and for public use (which is rare). A duplicate of that file is located in the Science Department, especially for use when the LINC Department is closed. The master copy of the resource file -- also in 5x8 format -- is maintained in the LINC workroom. This file has somewhat more information on resources -- such as leads on new resources and defunct entries -- than is found in other copies of the resource file.

At the beginning there was also a card index to resources by zip code. The space and time required to maintain the file did not justify it; therefore it was replaced with a list, in notebook form, that is updated occasionally. From time to time the LINC staff generate topic-specific lists of resources for distribution to appropriate organizations and clients. An example is a list of sources for the physically handicapped in the Memphis region, developed for use by a broad-based advisory group. Extensive lists are not generated for individuals.

As mentioned previously, the Directory of Human Services in Memphis and Shelby, Fayette, Lauderdale and Tipton Counties is also produced by LINC. This is drawn from the master resource file, including most of the entries and the key information about those entries. It is issued as a looseleaf notebook and is intended to be a yearly publication. The following kinds

Porter-Leath Children's Center
850 N. Manassas
P.O. Box 7231
Memphis 38107

PHONE: 526-3111

SERVICES: 1. Foster care programs:
a) place youth in foster homes.
b) place youth in group homes (i.e. usually 6 youths living in a facility maintained by the Center and cared for by a couple).

ELIGIBILITY: 1. Ages 11-17 (approximately).
2. Residents of Memphis or Shelby County.
3. Have an emotional or behavioral disorder.
4. Youth with mild physical handicaps requiring little special attention will be accepted.

2. Family day care program for children. Children receive care in a private home rather than in the usual group day care center. Care may be arranged during the day, evenings or weekends. Call 525-1901 for further information.

ELIGIBILITY: 1. Ages 6 weeks to 3 years old.
2. In need of day care for their development.

(see next card)

Porter-Leath Children's Center con't 2

3. Children's mothers must be:
a) Title XX income eligible.
b) In school, in training for a job, or employed.
4. Resident of Memphis.
5. Approved by the Dept. of Human Services (534-6560)

FEES: Based on ability to pay.

3. Counseling as it pertains to a child's needs, care, etc.

ELIGIBILITY: Parents of children involved in the Center's programs.

4. Provides speakers who will address the topic of foster home care. Program length is 45 minutes. One-to-two days notice is required. Contact Mary Ann Bassham for arrangements.

ELIGIBILITY: Any group.

HOURS: 8:30-5, M-F

DIRECTOR: James Bennett

(see next card)

Exhibit IV-C. Example of Resource Entry Card Set, Memphis.

Porter-Leath Children's Center con't 3

COMMENTS: There is usually a minimum stay of 1 year for children involved in the various programs.

DATE: 2-10-78

SUBJECT HEADINGS: 1.Day care centers. 2.Foster home care. 3.Mental health - Residential care. 4.Day care centers - Infant care.

Exhibit IV-C. Example of Resource Entry Card Set, Memphis (cont.).

DAY CARE CENTERS

see also

DAY CARE CENTERS - AFTER SCHOOL
DAY CARE CENTERS - BEFORE SCHOOL
DAY CARE CENTERS - SENIOR CITIZENS

Vertical File Material

DAY CARE CENTERS - INFANT CARE

/first index card/

Day Care Centers - 1

Department of Human Services (Tennessee). Licensing Section.

Neighborhood House

North Memphis Action Program (NMAP)

Porter-Leath Children's Center

Easter Seal Society for Crippled Children and Adults, West Tennessee Regic. Inc.

United Methodist Neighborhood Center

The Salvation Army

Goodwill Homes Community Services, Inc.

Head Start

/second index card/

Exhibit IV-D. Index Card Set, Memphis.

ECKANKAR

Ecology

See
ENVIRONMENTAL PROTECTION

Education

See specific subject headings, e.g. ADULT EDUCATION, ART EDUCATION, PRE-SCHOOL EDUCATION See also Literature Dept.

EDUCATIONAL COUNSELING

See also VOCATIONAL COUNSELING

ELECTIONS

See also Government Publications Dept.
VOTING

ELECTRICAL INSPECTION

ELECTRICAL PERMITS

EMERGENCY ASSISTANCE

See also FINANCIAL ASSISTANCE (EMERGENCY)
MEALS, FREE/NOMINAL CHARGE
RESCUE
SHELTER, TEMPORARY
TRANSPORTATION (EMERGENCY)

Emotionally disturbed

See
MENTAL HEALTH

EMPLOYMENT - ADULTS

See also SENIOR CITIZENS - EMPLOYMENT

EMPLOYMENT - YOUTH

EMPLOYMENT TESTS

ENCEPHALITIS

ENERGY CONSERVATION

ENGLISH LANGUAGE

ENVIRONMENTAL HEALTH

ENVIRONMENTAL PROTECTION

See also GARBAGE COLLECTION
RECYCLING
TRASH COLLECTION

ENVIRONMENTAL PROTECTION - EDUCATION

EPILEPSY - EDUCATION

EPILEPSY - INFORMATION AND REFERRAL

EXCHANGE STUDENTS

EX-CONVICTS

See also PAROLEES

EX-CONVICTS - RESIDENTIAL CARE

EXTRA SENSORY PERCEPTION

EYE BANKS

EYE CARE

EYE GLASSES

Exhibit IV-E. Page from the LINC Thesaurus, Memphis.

of resources are held in the LINC file:

- Churches, if they provide a non-religious service to the general public. Do not include church day care.
- Clubs and associations that provide a service
- Recreational programs (not specific entertainment events)
- Governmental services, as located in response to specific client queries
- Political organizations that offer a service
- Service agencies

A small separate file is maintained on commercial and professional services that are unusual or hard-to-locate in the public or non-profit sector. When providing information out of this file, the staff verbally disclaim to the client responsibility for comprehensiveness of the file. Information for the file is collected by phone, usually. On a rare occasion -- when adding a large or complex agency, or when administrative sanction is required -- the staff has interviewed agency staff in person. The interview is open-ended, without a schedule of questions to be asked, although guidelines for conducting the interview are specified in the LINC Manual.

Updating, which is done at least once a year or as the need arises, is done over the phone in the case of simple updating. For a more complex agency, the information existing in the file is mailed to the agency for review before the telephone update interview. In addition to answering I&R queries, the resource file and its index have been used by students for research papers and by agencies contemplating new services or proposals for development. It has also been used in finding speakers and program topics, on occasion.

The staff using the file assess it this way: They are quite satisfied with the file's arrangement, subject scope and depth of information. There is almost the same level of satisfaction with the indexing of the file, even though the staff feel the need for more cross-references and deeper indexing. At times there has been some displeasure with the currency of the file; for when there is staff turnover it is easy to fall behind. Generally, however, it is felt that a high-quality resource file is vital to the I&R job and that the resource file at LINC measures up.

E. I&R SERVICE DELIVERY

Queries that the public identify as "LINC" queries come into the central library by way of the dedicated LINC phone lines approximately 98% of the time. On occasion they enter in person through the subject department or through the LINC desk. Not all the queries coming into the LINC lines are bona fide LINC queries. Many people think their query is "LINC" in nature when it is a traditional reference query; some chose to use LINC for all questions because they liked the service they have received there in the past. For example, one client identifies LINC with the total library program of information-giving. Whereas she uses LINC frequently and is enthusiastic in its praise, it was clear that she rarely used it for I&R and often used it for answers to traditional reference or document-search questions. On policy LINC staff are instructed to refer all such queries to appropriate departments in the library. In practice, certain staff have been known to answer some of those queries themselves; this appears to be a rare occurrence.

In answering I&R queries, the staff tend to help the client narrow the number of possible resources to two or three, in an effort not to overload the client. A single transaction may take anywhere from 10 seconds to 25 minutes; rare "cases"-- bringing a query to some sort of closure -- can stretch out over months as a complex problem is pursued through several resources. The LINC resource file is used in most instances; there is also some reliance on pre-existing directories such as: old regional directories, directories compiled by neighborhood associations, the national directory of information and referral agencies compiled by the Alliance of Information and Referral Services and the Yellow Pages of the phone directory.

In answering the I&R queries the staff coordinates their efforts with existing I&R services in the region. Here are two examples: The Federal Information Center that is located in Memphis provides I&R related to the federal bureaucracy and its services; LINC and FIC use each other's services frequently. There is a Memphis area day care referral system, and LINC relies on that system for its day care I&R.

The LINC Referral Worksheets provide a full record of each transaction. Some of the LINC statistics -- such as topic of the query, and how the query was handled -- are drawn from these sheets. They are also used in training new staff and analyzing performance assessing. A sample worksheet, expurgated to protect the anonymity of the caller, is displayed as Exhibit IV-F. It should not be considered typical of LINC transaction. Rather, it probably falls into the top 5% of all transactions, in terms of the complexity of the query and the fullness of response.

DATE: 10/30/79
WALK-IN
TELEPHONE ✓

LINC-REFERRAL WORKSHEET 3-570

NAME.

IF CALLER IS THIRD PARTY:

PHONE:

NAME:

ADDRESS: 38127

RELATIONSHIP:

PHONE:

PROBLEM STATEMENT (Use this section to record pertinent details and the state the problem(s) the person needs help with. Another staff person needs to be able to read this section and clearly understand the situation.):

Problem is her husband & she are divorced She has 7 children ranging from 17 to 9 He does not contribute any child support has moved to Arizona SO she is always short of money. She works & takes home after $520.00 a month H&L house note/car note. Immediate needs is for 3 beds, refrigerator, clothes for some of her kids

ACTION TAKEN (List referrals, contacts by patron or LINC, pertinent information obtained.):

Patron → Juvenile Court in action to get child support

Patron → Credit Counseling

Patron → guidance counselors of schools her children attend for entry to Fund for Needy School Children

Linc → Salvation Army Social Services, Future Planned. May be able to arrange for one free visit & real cheap Patron needs to call Miss Powell

Exhibit IV-F. Referral Worksheet. Memphis.

11-19-79 As of today's date patron could not be approved & state didn't help at all. Only thing seems to be the last bit for this biggest patron until patron again (which she didn't do ~~this~~ tonight won't help) also your Fig Tree phpln not a sure thing.

RESULTS:

FOLLOWUP:

- ___ Services received
- ___ No services received
- ___ Patron did not follow through
- ___ No service available
- ___ No followup needed
- ___ No followup possible

SENIOR CITIZEN: ___
SERVICE CATEGORY ___ Emergency Assistance - ⇒ Clothing

5.

F. EXTERNAL RELATIONS

There was no effort to involve the public formally in planning and policy formation for I&R. This was perhaps due to a long-standing conviction that the Assistant Director for Public Services acquired while overseeing I&R at Detroit's TIP -- namely, that community advisory groups are a poor substitute for frequent forays into the community. It is not surprising, then, that the Assistant Director and the Head of LINC imported with them from Detroit the institution of "community walks," whereby LINC staff embarked on excursions into every community, learning of resources, identfying people's needs and talking to individuals and groups about the library's I&R service. The community walk was an important feature of LINC during the early stages. It has since been discontinued as a regular activity, based on the feeling that the payoff of repeating walks would not justify the use of staff time.

The LINC program is characterized by strong relationships with other agencies and organizations in the region and seems to be considered a significant new service in Memphis. The numerous specialized I&R's that existed before LINC could not, even in sum, provide the comprehensive service that a food omnibus I&R could provide; and the omnibus I&R service that was being operated by United Way before the library won the funding away from them was generally considered to be inadequate. United Way continued to compete in the provision of I&R for two years after LINC began, but gave up after that. Agencies tend to view LINC as a legitimate place to refer people to for I&R. The staff claim that they get "frequent" referrals from outside agencies. In other ways, too, there seems to be a spirit of active cooperation with non-library organizations. LINC provides copy for the issues of Sharing, and the staff have been active in training in other agencies -- such as the Department of Human Services and the Police Department -- for I&R work.

G. ADMINISTRATION

Exhibit IV-G offers a schematic view of the relationships among the main organizational system of MSCPLIC. Note that the head of LINC reports directly to the Assistant Director (now titled Deputy Director). These two were brought in simultaneously from Detroit. In the beginning, the Assistant Director worked closely with I&R. As time has passed he has attended more and more to other administrative responsibilities, leaving I&R primarily in the hands of the Head of LINC. Applying organizational consistency, the Head of LINC would perhaps be responsible to the Chief of the Main Library. Inasmuch as LINC began as a special project, it was purposely placed organizationally closer to the director, and it has remained there. When the current Head of LINC leaves, it is likely that LINC will assume that "logical" organizational place three steps away from the director.

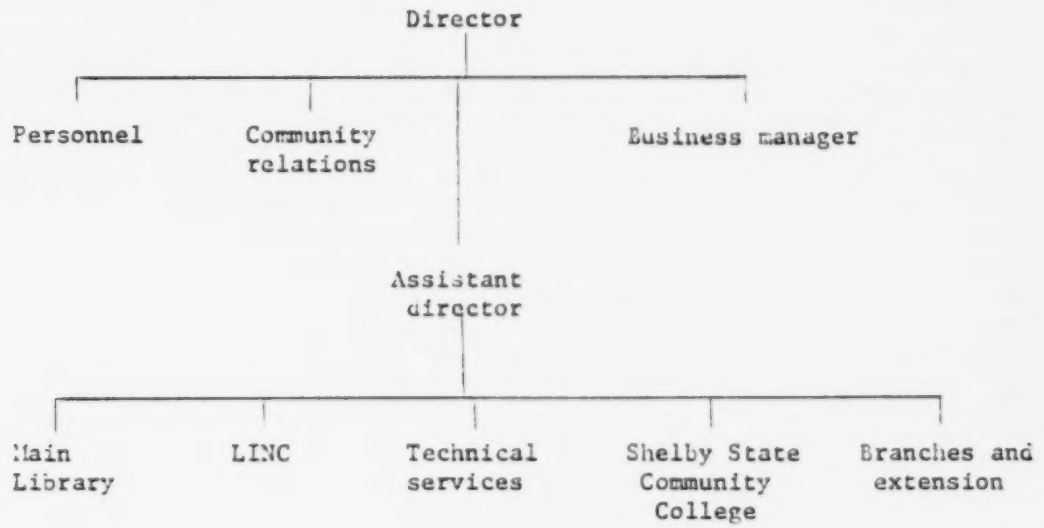

EXHIBIT IV G. ORGANIZATIONAL SCHEME, MEMPHIS.

STAFF

There are ten LINC staff, all working at the main library:

3 professional librarians (one, a cataloger)
4 library assistants with assorted backgrounds ranging from recreation to journalism to psychology. Experience in human services is represented to a small degree.
2 clerical workers
1 professional social worker, with some experience in social work and considerable experience in I&R in public libraries. (The head of the department.)

The team of deputy director and head of I&R services was imported wholesale from Detroit because of their demonstrated success in implementing an I&R service. Although it was not necessarily the intention of top management to have a mix of library and social work competencies in these two people, that is what was acquired. The managers of the library and of LINC consider this mix to be a strength of the LINC service and one of the factors that facilitated the implementation of LINC. Apparently the combination has worked well to establish credibility within the library and the human services communities. The social work background of the Head of LINC, particularly, quelled skepticism that might otherwise have been raised at the library's entry into the I&R realm.

The cataloger on the LINC staff is considered by management to be a key figure on the team. She is a particularly gifted cataloger and has been effective in building and maintaining a structure of files and a thesaurus that work well.

All MSCPLIC professional service staff were oriented to and trained in LINC operations when the service first began. The orientation training consumed five days of each trainee's time.

The LINC staff are trained rigorously for six months, during which time they are on probation. For several weeks they observe back-up operations and phone transactions in the LINC center. For several weeks after that they listen in on transactions being conducted by trained staff. Then they work one-on-one with another trained staff member, answering queries. After that they perform "solo," with a trained observer. Then, finally, they work on their own.

A significant element in the training of LINC staff is the "LINC Manual," a typed document of about 40 pages that offers direction

on particular kinds of questions, special resources, gathering information, workroom procedures, problems that might arise in the course of providing service, and established policy of LINC. A sample page from the "Manual" is displayed in Exhibit IV-H.

To reinforce the initial training, the whole LINC staff have weekly staff meetings, and about once a month one or more persons representing an outside resource is invited to talk with LINC staff about the functions of that resource.

All the LINC service staff (professionals and library assistants) share in providing answers to queries and in the back-up work of publicity and file maintenance. They also work some of their hours in the Business and Social Sciences Department. This practice was instituted for the main reason that it helps forestall the "burn-out" that occurs naturally in answering similar kinds of queries many of which are related to personal problems, day after day. A valuable side effect of working in the other department has been additional integration of I&R with traditional information-giving services in the library.

To further prevent burn-out -- specifically to allow each staff member to develop a special interest within the job -- each service person is assigned particular topics to specialize in. For instance, one person might act as a liaison to the mental health or senior citizen agencies.

HOW TO MAKE REFERRALS FOR PROFESSIONAL OR COMMERCIAL SERVICES:

Patrons may use LINC service for assistance in locating the following:

1. Professional services:

   Doctors, lawyers, etc.

2. Facilities where professional care is delivered:

   Day care centers, nursing homes, etc.

3. Commercial products or services

Since the library has no expertise or legitimate means to rate or evaluate professional or commercial services, the following options are available to us in assisting patrons who are seeking such services.

1. We can direct them to professional associations, licensing and accrediting organizations, etc. Such associations and organizations may indicate whether the individual or establishment in question is a member or is licensed, accredited or is a member in good standing.

2. We can make use of directories and listings of licensed professionals are facilities, and we can provide information on standards for licensing, accreditation, etc.

3. If the patron has a particular personal interest, like "I want a feminist doctor or lawyer," or "I want gestalt therapy," we can advise him to check with (or we can check for him) agencies or organizations with the same focus. For instance, the Women's Resources Center or the Center for Reproductive Health would be helpful in the first example, and Gateways, Inc. would be one resource for the second.

4. We can offer the patron backup information in whatever form may be appropriate to help him make his selection, e.g. a government publication about choosing a moving company, a book or article about selecting a physician, etc. This should include interpreting how-to-do-it information for the patron who has difficulty reading. (This will not always be apparent, but when it is, this further degree of helpfulness is appropriate.)

5. For commercial services, we can search the Yellow Pages for the patron, making clear that that is what we are doing and we are locating the service or product for him, but not recommending it. Always select more than one possible source, if more than one is listed. Point out to the patron that the time to consult the Better Business Bureau is before using a commercial service or purchasing merchandise.

Exhibit IV-H. Sample Page from "LINC Manual." Memphis

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COSTS

As discussed above, $368,000 was received from outside sources over a two-year period to get LINC started. The amount was arrived at arbitrarily. Rather than representing an accurate estimate of what was needed, it was simply $1,000,000 divided among three reasonable proposals that were submitted to the Quarterly Court. The amount was certainly more than was needed; and being such a generous grant, and so visible to the service community in Memphis, it may have compelled the LINC staff to exert special effort to build an effective I&R operation in short order. It is probable that $200,000 over two years would have sufficed to put LINC together.

However, in addition to the grant, the library added about 20 new full-time staff -- some professionals, some library assistants -- to the regular budget. They were deployed to branches, with three to the Sciences Department, to do interviewing of resources and community walks. No more than half of their time was spent in I&R activities. This would probably have cost about $100,000, beyond the grant. The estimated budget for expenditures for LINC for Fiscal Year 1981 was $158,183, plus $2500 for telephone costs and $200 for minor printing expenses. These costs do not include physical plant expenses. The Area Agency on Aging currently adds approximately $31,000 to the MSCPLIC coffers to cover the cost of two LINC staff and part of the costs of reproducing the Human Services Directory. The total unrecovered costs for I&R for FY 81 was close to $130,000, defrayed out of the regular MSCPLIC budget.

PUBLICITY

Initial publicity advertised LINC as a distinct new library service. Publicity consisted of one paid advertisement in newspapers (not a news feature), radio and television spots, flyers and brochures, placards on the outside of municipal buses, and walks. In addition, LINC held an open house at the LINC offices for agencies listed in the resource file; approximately 150 representatives made an appearance.

After the initial spate of publicity, television spots have been made standard modes of advertising. They fill out the continuous program of publicity that maintains for LINC a rather even volume of queries, with highs and lows that are not far apart.

In September 1978 LINC staff conducted a publicity survey of 632 people out of the 1,493 who used LINC. The results were as follows:

How did you hear about LINC?

Other agency	170 respondents
TV, radio	138
Main or branch library	88
Friend or relative	80
Phone book	39
Newspaper or magazine	30
LINC speaker	23
Brochure	20
Bus placard	18
Business	11
Directory	5

Those surveyed were almost evenly divided between those who had used LINC before, and those who hadn't. According to the survey, the most effective forms of publicity are other agencies, the broadcast media (television is the most effective of the two), in-library ads or referrals, and friends and relatives. All other forms of publicity fall far below these four in impact.

Unlike other publicity for the library, LINC's is handled primarily by the LINC staff, with assistance from the Public Relations Department, especially with regard to television and radio spots, and with free consultation with a local advertising firm. Initially, $1800 was spent on artwork for the bus placards. Since then, negligible amounts have been spent on publicity supplies, and the cost of 10% of one of LINC's professional staff is attributable to publicity.

Whereas in the past the approach has been to advertise LINC to the general population, there is now a program of targeting not the service but the advertising for the service. The targets may be such specific subgroups as senior citizens, the poor, parents, and the non-English-speaking.

H. I&R IN THE CONTEXT OF OTHER LIBRARY SERVICES

The staff of the LINC Department are convinced of the importance of the work they are doing. They see LINC as a critical new service for the Memphis area, and they tend to feel that it has vitalized the library generally, by promoting the library as an answerer of questions (in addition as a supplier of books) and raising the public's esteem for the library. LINC staff and other staff feel that the public have received the LINC service enthusiastically and that the promotion of LINC has not only brought a new wave of I&R queries into the library, but also has significantly increased the number of "traditional" reference queries. The staff interviewed consider LINC significant in terms of the importance of its mission, and the volume of business it brings into the library and public relations.

Among the staff, both LINC and non-LINC, there seems to be substantial agreement on what is and what is not an I&R query. This level of agreement -- higher than witnessed at most other sites -- is likely due to the extensive, intensive training of all library staff at the outset of LINC and to the clear distinction between LINC activities and other library activities.

While everyone acknowledges the significance of LINC, some staff -- usually those who have been working longer -- believe it is not a legitimate library activity. There is widespread -- though not deep -- resentment toward LINC for the extraordinary attention it has always received.

The top management of MSCPLIC is clearly enthusiastic, almost by definition. After all, one half of the library's top management -- the Assistant Director -- was brought into the organization with the express purpose to establish I&R. The other half -- the Director -- was the force in making the decision to adopt I&R and has evidenced a long-term commitment to transforming the public library from an institution that delivers only materials to an institution that also delivers answers. The Director has made I&R the top priority for library growth for several years and has committed substantial amounts of the library's regular budgetary resources to the development and operation of LINC.

Viewed in perspective with other services and activities of MSCPLIC, LINC can be classed as a highly centralized yet fairly integrated activity. It is a distinct department, with a distinct budget and staff and a distinct priority within the library. The degree of distinctiveness might ordinarily presage a low degree of integration within the organization. However, LINC has managed to be moderately integrated and deliberately so: LINC staff work some hours in the Sciences Department, where it is felt that I&R and traditional reference service reinforce each other in answering a query;

Sciences staff and LINC staff are cross-trained; the LINC file is in every branch except one new experimental branch; all staff were oriented to and trained in LINC operations. More efforts at integrating are being considered: closer ties with the various reference departments; more cross-training; and possibly attempts to increase I&R activity in the branches. (It is very low and -- many branch staff opine -- rightly so, inasmuch as they feel they lack the special skills and constant exposure required to do a proper job.)

I. EVALUATION

The LINC staff collect more data about I&R than do the staff of any other site. Some of the data collection is on-going tallies; some of it is occasional surveys. The following are continuously collected:

- Number of I&R queries
- Topics of I&R queries
- Mode of intake (walk-in, phone, mail)
- Number of three-way calls
- Number of follow-ups
- Senior citizen or not (to report to the Area Agency on Aging)
- Service received or not received by client or service not available

In addition, the staff have conducted occasional surveys of LINC clients in order to learn:

- How the client learned of LINC
- Whether or not the client had used LINC before

TRANSACTION SURVEY

LINC staff interviewed clients on seven days between January and March 1980. These seven days were taken from the list of randomly selected dates for 1980 that Baltimore County uses to collect its information statistics. Memphis was to interview, insofar as possible, every LINC client on these days until 400 forms were completed. Thus data were collected on one Monday, two Tuesdays, two Wednesdays, one Thursday and one Saturday. The staff attempted to interview every client on those days. During the seven sample days, they initiated interviews with 427 people which was approximately 60% of the total estimate of LINC clients. Four people refused to be interviewed; twelve forms were incomplete. The remaining 411 completed interviews were all usable and provide a statistically valid picture of I&R transactions during the January-March period. On the following page are the tabulated responses to the survey. There are several noteworthy observations to be made on the simple frequencies of the data:

- About 2/3 of the users of I&R service have used it before (recognizing the limitations of this question, as explained earlier).
- About 3/4 of the I&R clients have used other library services before, and almost 2/3 of these had used them within the past three months ("regular users").
- The I&R service was learned about equally through human sources (friends, neighbors, relatives, library staff, agency personnel) and through the media. The one most frequently mentioned is television; second is friend-neighbor-relative.
- In about 1/3 of the cases, the client had asked his/her query elsewhere.
- The 20-35 age group predominates among the clients.
- Over half the clients have at least some college education.
- About 44% of the clients reported a family income of under $14,000. This is likely a function of the income level of the Memphis region which, in 1970, was 70% of the national per capita income.
- The great majority of clients are female.
- Telephone calls account for 98% of all queries. This may be attributable to the fact that the LINC desk is purposely sequestered in a corner of the second floor, in order to make it primarily a phone-in service.
- In the great majority of cases "simple information-giving" was provided. Rarely did the staff contact a resource on a specific client's behalf.
- As might be expected, the LINC file was used in responding to almost all the queries.

Close to 500 cross-tabulations were performed on the data for each library. Several of them seem meaningful in the Memphis situation:

- There is a tendency for people who have used LINC before to have more years of formal education.

12 Agency call (answer only questions 9-12)

__ No response (answer no questions)

PUBLIC LIBRARY INFORMATION AND REFERRAL PROJECT

Branch _____
Date _____
Time _____

We're trying to improve our service. Would you help us by answering a few questions? We won't record your name and it should take only one minute.

1. Have you used the library's information service before -- the one you're using now? n = 363

[62] Yes [37] No [1] Don't know

2. Have you used any other service of this library system? n = 361

[7] Yes [94] No [1] Don't know

IF YES: n = 273

[5] Was it within past 3 months?
[35] Was it within past year?
[6] Was it longer ago? (Or don't remember)

3. How did you learn of the library's information service? n =

[9] Friend, neighbor, relative 362
[2] Library staff 361
[4] Referred by an agency 361
[0] Radio 362
[7] Television 362
[3] Newspaper 361
[3] Other 361

4. Have you asked your question in any other places before coming to the library? (You don't have to name them.) n = 357

[2] Yes [2] No

5. I'll read some age groups. Just stop me when you hear yours. [Interviewer: Omit obviously wrong groups when possible.]

n = 363

a[7] 13-19
b[57] 20-35
c[2] 36-45
d[2] 46-64
e[3] 65 or over
[2] Declined to state

6. I'll read some groups based on years of education completed. Just tell me when you hear yours.

n = 363

a[14] College graduate
b[34] Some college
c[3] High school graduate
d[1] Some high school
e[1] 8th grade or Less
[1] Declined to state

7. In which of these groups did your total family income, from all sources, fall last year -- before taxes, that is? I'll read the groups.

n = 360

a[23] Up to $8,000
b[1] $8,000 to $14,000
c[1] $14,000 to $20,000
d[3] $20,000 to $26,000
e[1] Above $26,000
[12] Declined to state/don't know

That's all the questions. Thank you very much for your help.

INTERVIEWER TO FILL OUT REMAINDER:

8. Sex of patron n = 353

[28] Male [72] Female

9. Mode of inquiry n = 372

[97] Telephone [2] Visit

10. Topic of question (check all that apply) n = 362

[3] Money matters
[2] Consumer issues
[1] Housing/hshld. maint.
[1] Health
[1] Job-related issues
[5] Transportation
[1] Education
[1] Neighborhood issues
[1] Recreation, sports
[3] Family relations
[ ] Crime & safety
[1] Legal matters
[1] Child care
[32] Other

11. Disposition of question (All that apply)

n = 372

[3] Information was given
[2] Information was given after interview to probe underlying need
[1] Librarian contacted a resource on patron's behalf
[1] Other (Specify)

12. Was question answered (or referral made) from a resource file created by the library?

[1] Yes [ ] No

Exhibit IV-Eve. Survey results, Memphis.

Day of the Week: n=410

Sun	0	**Thurs**	14
Mon	21	**Fri**	0
Tues	32	**Sat**	5
Wed	28		

Typology of Education and Income: n=315

Low educ, low income	17
Low educ, hi income	4
Hi educ, low income	32
Hi educ, hi income	47

Exhibit IV-Eye. Survey results, Memphis (cont.).

- Older clients have used the library less recently than the younger clients.
- Older clients -- especially seniors -- more than other age groups tend to learn of LINC from an agency.
- As well, those with lower family incomes are more likely to learn of LINC from an agency.
- If the client asked his/her query elsewhere before coming to LINC, LINC staff are less likely to contact an outside resource on his/her behalf.
- Generally, query topics did not correlate with other variables. However, there were some exceptions:
  - If the query related to money matters, the staff were more likely to engage in "complex information-giving" or contact an outside resource on behalf of the client.
  - Household-related queries are more likely to be posed by older than by younger clients.
  - Health and family-related topics are more likely than others to result in complex information-giving.
  - People asking legal queries tend to learn about LINC more frequently from television than askers of other query topics.
- LINC staff tend to engage in complex information-giving with less educated rather than more educated clients.
- With the older client -- especially those 65 and over -- staff are more likely to contact a resource on his/her behalf.

The composite "typology" of education and income described in the Methodology chapter was cross-tabulated with numerous variables. The findings speak to the relationship of LINC to its market: Is LINC attracting what could be considered a standard library clientele? Or is it drawing from a new segment of the population? We shall characterize that "standard library clientele" -- based on numerous studies performed since the late 1940's -- as more likely to have completed some higher education and more likely to fall into the higher income brackets than are the non-users of public libraries. The data from Memphis indicate that "standard library clients" are more likely to be users of LINC. There is a tendency for those with higher education and higher family income to have used LINC before and the same holds true of their use of library services in general.

REFERENCE ACTIVITY COMPARED WITH I&R

In fiscal year 1978-79 LINC queries received either at the main library or at the branches amounted to 22,085; in 1979-80, 30,700. Reference queries received throughout the system amounted to 283,167 for the same period. Obviously, in terms of volume, traditional reference activity outstrips LINC. Yet virtually everyone interviewed -- both LINC staff and non-LINC staff -- assessed LINC as a significant feature in the library's service program in

terms of philosophy and volume.

Since the beginning of LINC, there has been about a 40% increase in all reference queries received by the various departments and branches of MSCPLIC, according to management. They and the staff in the various departments readily acknowledge the role of LINC in establishing the library as a popular information-giving place.

STAFF ASSESSMENT

The staff report few deficiencies in I&R at Memphis. The service is well used by the public, accepted by human service agencies in the region, funded adequately for the kind of service being provided, and incorporated reasonably well into the program of library services. Some branch staff are concerned that the service will be spread to the branches where, they felt, the volume of I&R queries will not justify maintaining either the LINC file or I&R skills. Some LINC staff are concerned that, despite precautions mentioned above, burn-out will occur. They are also continuously concerned about maintaining currency of the LINC file; even slight disruptions in staffing can undo the schedule for updating entries. LINC staff, other service staff and top managers alike would prefer to see closer integration of LINC with reference services -- perhaps by making LINC part of the Sciences Department. A goal of the managers that could hardly be considered a deficiency at the moment is automation. Staff are considering MARC-type format for I&R computerization. Appropriate software may be commercially available for I&R through Bibliographic Retrieval Services in 1981.

LINC can be compared with Detroit Public Library's TIP service. Memphis by its very nature did not present the problems evident in Detroit. For instance, Detroit's sheer size -- both of the city and the library system -- required a longer time to win over the human services community and the library staff than was provided for in the development schedule. TIP was designed much as LINC: an autonomous unit added to an existing organization. TIP, however, was added to a considerably larger organization than was LINC, and the effort required to overcome territorial barriers in TIP would necessarily have been greater. It seems such barriers have been more successfully overcome in LINC, partly because of the smaller scale of Memphis and partly because of more deliberate attention to integrating LINC with other library activities. In a more abstract vein, certain difficulties at TIP could perhaps be traced to the fact that TIP was introduced in part as a catalyst to solve branch and general library problems (decreasing funds and diminished use of traditional library services.) It appears that at Memphis a healthier environment for I&R prevailed: top management had long advocated the importance of information-giving as a library service; the staff were relatively receptive to the idea of I&R before it was introduced; some staff had backgrounds in the human service sector; the library was not facing serious financial recision. All of these factors seemed to have contributed to viewing LINC for its value as a service, rather than for its value in bailing out a sinking institution.

ENDNOTES

1. Memphis Area Chamber of Commerce, Memphis Community Data (Memphis, TN : Memphis Area Chamber of Commerce, November 1978) and U.S. Department of Commerce. Bureau of the Census. Statistical Abstract of the United States, 1979.

2. Refer to Thomas Childers. "The Neighborhood Information Project." Library Quarterly 46 (July 1976): 271-289.

3. Memphis-Shelby County Public Library and Information Center. Annual Report, 1975-76. (Memphis, TN : Memphis-Shelby County Public Library and Information Center, 1976).

CHAPTER V

COLORADO SPRINGS

A. THE SITE

THE CITY AND COUNTY

Colorado Springs lies at the foot of Pikes Peak, in El Paso County. In 1978 it was estimated that the population totalled 322,000 people. About 2/3 of them live inside the city limits. The eastern part of the County is largely rural.

In 1970 minorities constituted 14.1% of the population: 9% Spanish and 5% black. The median age in the County was 23.5 years (compared with 28.1 years for the nation). Twelve percent of the population was over age 55. The median number of school years completed by El Paso County residents was 12.6 (compared to 12.1 nationally).[1] The median family income for Colorado Springs in 1970 was $9,090 (compared to $9,596 for the U.S.).[2]

The area has four military institutions, including the U.S. Air Force Academy. In 1974, government accounted for 49% of "industry earnings." In 1970, approximately 56% of the total labor force was employed in white collar positions, compared to 53% in Colorado and 48% in the U.S.[3]

THE LIBRARY

Library services for Colorado Springs residents have been available in limited form since the late 1800's, when the Colorado Springs Social Union developed a small literature collection with funds raised through donations and socials.

The City of Colorado Springs began financial support of library services in 1903, and in 1905 dedicated a new library, known as the Colorado Springs Public Library.

On January 1, 1964, the Pikes Peak Library District came into official existence. Under Colorado State Library Law provisions, the 5-member Board is selected by a committee appointed jointly by Colorado Springs City Council and the Board of County Commissioners.

In 1968, the El Pomar Foundation donated a new Main Library facility (Penrose Public Library) to the community. The old Colorado Springs Library (located behind Penrose Library) was remodeled and reopened as Palmer Wing in 1969.

The District now maintains nine branches in the county (including a small branch at the El Paso County Jail), and operates two bookmobiles and a children's multi-media van throughout the county.[4]

The Library District serves all of El Paso County, excluding the unincorporated area of Security/Widefield and the municipality of Manitou Springs. The service population of the District was 289,300 as of 1977. The operating budget was $2,219,172 in fiscal year 1980.

B. ORIGINS

In Fall 1977 the Junior League, in cooperation with the Pikes Peak Regional Library System (PPRLS), began to collect information on free or inexpensive services in the Pikes Peak area. The library provided office space, telephones and a half-time reference librarian to assist the Junior League volunteers. An old library file of community resources was updated and used as the basis for the new file. Approximately one year was spent in file development, and service to the public began in 1978 under the name of CALL, "Citizen's Action Line Limitless." It was operated four hours a day by the Junior League. They continued to staff and manage the project until March 1979.

Also in 1977 community leaders and concerned citizens published "Citizen's Goals for the Colorado Springs Community." This document emphasized the need for a centrally located public information service for the Pikes Peak area that could put citizens in touch with social services, governmental, cultural and recreational information. Given the central location, widely dispersed branches and long hours of availability of the library, the library's managers felt that the Penrose Library could become the required public information source. In 1978 the Library organized the Community Interaction Team (CIT), headed by two librarians and three CETA workers. The team began to accumulate community information for library files by visiting social service organizations, government agencies, clubs, and educational and recreational organizations. Late in 1979 a millage increase brought the library the funds to consolidate the work of the Junior League's CALL and the library's CIT, and to bring the resulting single service under the umbrella of regular library funding. The Information Services Desk (ISD) was established at Penrose Library to serve as the center of operation for community information.

During the time of the CALL and CIT programs, the library was also developing its own software for on-line access to an inventory of all materials, client registration data, circulation records and acquisition files. The resource files of CALL and CIT were incorporated into the computer, with on-line access, and were regrouped into four files. A fifth was added in 1980. As currently defined, they are:

- CALL - Citizen's Action Line Limitless -- human services and government resources
- COURSES -- adult education and recreation opportunities
- CLUB -- a roster of clubs and local organizations in the area
- CALENDAR -- a listing of educational, cultural and recreational events inside and outside the library
- DAYCARE -- a listing of day care centers and homes

C. I&R SERVICE CONCEPT

The service goals for the Junior League's CALL project were the following:

- . to develop a complete and current file of existing agencies and their services
- . to interpret a patron's situation and to present optional resources that might respond to it
- . to follow up services to insure that the patron's needs have been met.

The current goal for the Information Services Division is as follows:

> "Information Services is designed as a point for delivering information about the library and the community. The purpose is to provide quick and efficient access to resources with the help of the computer and selected sets of printed materials." [5]

As stated, the goal currently guiding the activities of the ISD encompasses the goals of the superseded CALL project. ISD includes the I&R function, of course. Yet it also includes the task of informing people about the resources and services within the Library -- a function that is ordinarily, and by the definitions of this study, not considered to be I&R. One of the goals in the Library's long-range plan is to provide services to target groups such as senior citizens, young adults and the handicapped and disadvantaged. The staff in the Information Services Division felt that these particular sub-groups of the population do use the I&R service. Also, the number of requests for free services such as food and clothing leads them to believe that people who are economically disadvantaged use I&R.

The staff who work in the Information Services Division (ISD) are divided into three teams that handle the (1) CALL and CLUB files, (2) the community events calendar and local business information, and (3) educational and career information, including COURSES. However, all staff members work on the Information Service desk in addition to performing team duties. A fourth team is responsible for designing new informational data bases and training for computer-assisted searching.

Simple and complex information are provided as a standard service. The staff do some referrals, but rarely -- about 3% of the time, judging by the data from the transaction survey. One staff member stated that now that CALL is "just another reference file" the original service objectives of referral and follow-up are not being done. This change in service objectives seems to be due mostly to lack of staff time.

Advice about outside resources is not provided at all; advise about strategy is not provided as a standard service, but is done by some staff. Although follow-up is not provided as a standard service, several staff said they suggest to the client that he/she call back if the resources they have been directed to were inadequate. Advocacy seems not to occur at all, although a few staff members said that it was the domain of the CALL team to provide this service, albeit in a low-keyed manner.

Feedback is not provided; nor are counselling, transportation or escort. However, appropriate information or referrals will be given to people who seem to need these last three services. One staff member summed up ISD's Objectives: "the main intent is to provide informational services, not others."

The main library is open from 10 a.m. to 9 p.m., Monday through Thursday, and 10 a.m. to 6 p.m., Friday and Saturday. Clients access the resource files by telephone or in-person.

D. THE RESOURCE FILE

When the Junior League began the CALL Office in 1977, the file was on 5x8 index cards. By the time the Information Services Division was established in 1979, the file was on-line. All nine branches (excluding the jail) have CRT terminals for on-line access. Six terminals are located in the Penrose Library, the main library of the District, three of which are in ISD and two in Reference. Also, print-outs of the CALL and CLUB files are available in ISD and Reference in the main library. At ISD there is also a public terminal which can access only information about library holdings. In order to access any community files on-line, the public needs an intermediary -- a staff member knowledgeable about passwords and keywords. In fact, this staff member actually delivers in-person I&R-type service to the patron. However, print-outs of the CALL and CLUB file are available for patron use without an intermediary, and the COURSES file is available to home computer users.

All the community information files -- CALL, COURSES, CLUB, CALENDAR and DAYCARE -- are separate files. They have unique kinds of information, unique access terms, and unique structures (arrangements, keywords, cross references.) While the separation often permits faster access to an item within a given file, it also requires that staff be familiar with the distinct information in, access to, and structures of each file in order to use the whole set of them well. The Information Services Manual contains instructions on how to access each file, as well as a list of all keywords and cross-references.

Initially, the CALL file contained about 300 entries; now the entries number 661. The CLUB file originally contained about 200 clubs; presently, it contains 582. COURSES has 2181 records, and CALENDAR has an average of 214 entries at any one time. The number of both educational courses and community events can vary. The above figures are current as of October 1, 1980.

The CALL file can be accessed by agency names, 176 keywords and 154 cross-references. Keyword access yields the name of the resource, a brief description, and the telephone number. See Exhibit V-A. A list of valid keywords can also be called up.

Access by agency name yields the following information:

- Name, address and phone number of resource
- Description of services or activities
- Name and title of person to contact
- Name and title of person in charge
- Type of service (federal, state, local, private)
- Sources of financial support
- Hours of service
- Eligibility requirements
- Service capability/availability of services
- Goal or purpose of resource agency
- Methods of obtaining service
- Speakers available
- Subject headings
- Terms of office and frequency of rotation of officers
- Use of volunteer staff

```
Program: CALL READ

           INDEXED   AREA  LISTING


  A   List by agency          V   List valid keywords
  K   List by keyword         X   Exit from program

? K
First keyword? INFORMATION AND REFERRAL
Keyword or 'GO'? GO
    INFORMATION AND REFERRAL      there are  40  agencies

1   TRAVELERS AID-AIRPORT OFFICE                              398-3873
    INFORMATION AND DIRECTION TO TRAVELERS. PROTECTIVE TRAVEL

2   ABORTION INFORMATION AND REFERRAL                         597-8898
    EMPHASIZES RIGHT TO CHOICE. PREGNANCY TESTING; URINE $10,

3   CATHOLIC COMMUNITY SERVICES                               303-636-2345
    REFERRAL SERVICE, COUNSEL, AND ADVOCATE FOR THE POOR.

4   CHAMBER OF COMMERCE, COLORADO SPRINGS                     635-1551
    INFORMATION CENTER FOR COMMUNITY CONCERNING TOURISM, LEGISLATIVE

5   SILVER KEY SENIOR SERVICES                                632-1521
    TO PROVIDE IN-HOME SERVICES TO THE ELDERLY WHICH WILL PROVIDE

6   CALL                                                      471-CALL
    INFORMATION AND REFERRAL ON FREE OR INEXPENSIVE SERVICES.
```

EXHIBIT V- A. Partial listing from CALL File, on keyword "Information and Referral," Colorado Springs.

This is the fullest information about the resource contained in the file. See Exhibit V-B for an example. In addition, a collection of agency publications (pamphlets, etc.) is maintained separately. A print-out of all or a part of the CALL file is available to the public, on demand. The first ten pages are free; the charge is $.10 for each additional page. A full print-out of the CALL or CLUB file is $25.00.

The keyword list for the CALL file is controlled and is user-oriented to the extent that its creators sought to use popular terminology. Although inclusion and exclusion of keywords are arbitrary, they have been predicated mostly on popular use.

New resources for the CALL file come to the attention of the CALL team via newspapers, phone calls and community meetings. A questionnaire is sent to the resource in order to gather information for the file. See Exhibit V-C. Telephone updating is done once a year or as the need arises. The CALL team, including a librarian, library technician and clerical worker is responsible for maintaining the currency and comprehensiveness of the file. A print-out of the complete CALL file is available at no charge to other libraries and agencies that have helped in updating the file. Also, the tape of the CALL file is available to any agency with facilities to print its own copy.

The resources in the COURSES file are courses and recreational programs for adults in the Pikes Peak area. Resources can be accessed by name of course, by 84 keywords contained in the files of the courses, or by 284 cross-references. See Exhibit V-D. Keyword access provides the name of the course, dates and times, cost, instructor, telephone number, location, and director/coordinator of the institution that offers the course or program. See Exhibit V-E.

The CLUB file also can be accessed by name and keyword. Keyword access provides a club's name, brief description, and telephone. See Exhibit V-F. Full information about the club can be had by entering the name of the club. This information includes name, address, contact person, phone number, function(s), date of election of officers, number of members, and keywords. See Exhibit V-G. The CLUB file contains 175 keywords with no cross-references. A print-out of the CLUB file is available at both the ISD and the reference desks at the main library. The Community Events Calendar, CALENDAR, contains a chronological listing of events in the community and in the library. See Exhibit V-H for a partial calendar. The information includes date, time, event, sponsoring agency, address, cost, and telephone number. The types of events include music, dance, and dramatic performances; lectures; and demonstrations. Exhibits and displays are listed at the end of the calendar. This file can also be accessed by type of event and sponsoring agency. The library prints and mails 250 copies of the calendar each month to community groups and individuals. CALENDAR is supplemented by a Community Events bulletin board in the library.

With the cooperation of the Urban League the Library has recently established a computerized index to daycare centers and homes. The file, DAYCARE, is indexed by name and by the closest elementary school (in order to provide a geographic framework for users of the file). See Exhibit V-Eye. In the future the Library hopes to index all pre-schools and all commercial daycare centers.

CALL 29-Aug-80
PENROSE PUBLIC LIBRARY
471-CALL ALL LIBRARY HRS.
20 N. CASCADE, COLORADO SPRINGS, CO. 80901
Director: CINDY SLATER
Contact person: MAXINE
Eligibility:
ANYONE, ACCESS TO CALL AND CLUB FILES FOR REFERRALS.

Function and purpose:
INFORMATION AND REFERRAL ON FREE OR INEXPENSIVE SERVICES.
REFER TO APPROPRIATE AGENCY OR SERVICE TO MEET CALLER'S NEEDS
FOLLOW-UP ON REFERRALS, LIBRARY RESOURCES AVAILABLE FOR INFO.,
COORDINATES INFORMATION GATHERING WITH OTHER I & R AGENCIES.
Application procedure: PHONE OR WALK-IN
Keywords of this agency:

INFORMATION AND REFERRAL	DIRECTORIES
ETHNIC SERVICES	CLUBS
LIBRARIES	

EXHIBIT V-3. Listing from CALL File under keyword "CALL." Colorado Springs.

1. NAME OF AGENCY OR SERVICE: (55 spaces) _____

2. PARENT AGENCY AND/OR ACRONYM: (64 spaces) _____

3. PHONE: (34 spaces) _____

4. HOURS: (30 spaces) _____

5. ADDRESS: (64 spaces) _____

6a. DIRECTOR: 30 spaces) _____

6b. CONTACT PERSON: (30 spaces) _____

7. ELIGIBILITY: (2 lines of 70 spaces each)

_____

_____

8. FUNCTION AND PURPOSE: (4 lines of 72 spaces each)

_____

_____

_____

_____

9. APPLICATION PROCEDURE: (30 spaces) _____

10. SUBJECT HEADINGS: (10 lines of 27 spaces each)

_____ _____

_____ _____

_____ _____

_____ _____

11. FUNDED BY: (30 spaces) _____

12. ADMINISTERED BY: (30 spaces) _____

Person giving above info: _____

Person collecting info: _____

EXHIBIT V-C. 471-CALL Questionnaire. Colorado Springs.

KEYWORD VOCABULARY LISTING FOR COURSES

abuse, child or wife see RELATIONSHIPS

accident investigation see CRIME

accounting see BUSINESS

accounting, personal see FINANCE

accupuncture see EASTERN ARTS

acting see THEATER

adjustments see REAL ESTATE

administration see MANAGEMENT

ADULT

adult education see BASIC EDUCATION

ADVANCED

advertising see BUSINESS

aerobic see FITNESS

AGED

aggressiveness see SELF IMPROVEMENT

air conditioner, design see ELECTRONICS

air conditioner, repair see SERVICING

airline see AVIATION

alcoholism see HEALTH

EXHIBIT V-D. Partial keyword vocabulary listing for COURSES. Colorado Springs.

```
Program: COURSES

P = Search by institution
K = Search by course keyword
X = Exit program
Command? K
Keyword? BUSINESS
Keyword? WOMEN
Keyword? GO

WS  24 WOMEN IN SALES                                    Days:TUE
    Course runs FROM 11/04 TO 11/04    Hours: 6:30 PM to 9:30 PM
    Cost is $ 6  FOR MORE INFORMATION AND ENROLLMENT CALL 635-2043
      Located at
    NORTH COMMUNITY SCHOOL                                  635-2043
    612 E YAMPA          Colorado Springs, Colorado   80903
                         CM10
    Director / Coordinator: GINGER BARNS


UC   4 MANAGEMENT DEVELOPMENT FOR WOMEN SERIES/ Days:THU
    Course runs FROM 10/23 TO 11/20    Hours: 6:00 PM to 9:00 PM
    Cost is $ 115  FOR MORE INFORMATION AND ENROLLMENT CALL 593-3368
      Located at
There are  3  courses with this key
Press RETURN to continue?

UC   3 MANAGEMENT FOR WOMEN WORKSHOP                    Days:FRI
    Course runs FROM 10/17 TO 10/17    Hours: 09:00 AM to 4:30 PM
    Cost is $ 35  FOR MORE INFORMATION AND ENROLLMENT CALL 593-3368
      Located at
Keyword?
```

EXHIBIT V-E. Two listings in COURSES file under keywords "Women" and "Business." Colorado Springs.

```
Program: CLUBS


     C = Search for clubs by name
     K = Search for clubs by keyword
     V = Print valid keyword list
     X = Exit the program  (also END and EXIT)

               ? K
First keyword? WOMEN
Keyword or 'GO'? GO
     WOMEN                              There are  69  clubs

1    BUSINESS AND PROFESSIONAL WOMEN                        632-4514 (AFTER 5PM)
     WOMEN HELPING WOMEN. SCHOLARSHIP EACH YEAR TO A WOMAN IN THE

2    BUSINESS WOMEN'S ASSN., PIKES PEAK                     635-7086
     FURTHERING EDUCATION OF WOMEN IN BUSINESS

3    BUSINESS WOMEN'S ASSN., CHARTER CHAPTER                634-7156/471-4910
     NON-PROFIT ORGANIZATION. PROVIDE SCHOLARSHIPS TO

4    COWBELLES, PIKES PEAK                                  (303) 683-2272
     PROMOTE BEEF

5    CREDIT WOMEN (INTERNATIONAL), PIKES PEAK CHAPTER       475-7700 EXT231
     KEEP MEMBERS UPDATED ON

6    BUSINESS WOMEN'S ASSN., COLUMBINE CHAPTER              632-1701
     HELP WOMEN IN BUSINESS ADVANCE THROUGH EDUCATION, INCREASED

( or ,n,Pn,X,HELP)? HELP
 or  is Carriage Return and it advances to next page
n    is a number,  the one left of a club
Pn   is P with a page immediately following ie P1 or P5
X    is to return to 'First Keyword' (also END and EXIT)
( or ,n,Pn,X,HELP)? 3
```

EXHIBIT V-F. Partial resource listing in the CLUB File under keyword "Women." Colorado Springs.

```
1.  Club:           BUSINESS WOMEN'S ASSN., CHARTER CHAPTER
2.  Address:        1711 WEST PLATTE AVE
3.  City, State:    COLORADO SPRINGS, COLORADO
4.  Zip code:       80904
5.  Contact Person:ROSE ANN NICHOLS
6.  Phone number:   634-7156/471-4910
7.  Function (s):
    NON-PROFIT ORGANIZATION. PROVIDE SCHOLARSHIPS TO
    RECEIPENTS VOTED ON BY OUR CHAPTER.
8.  Meeting time and place:
    3RD MON, VARIOUS LOCATIONS
9.  Renew date:     AUG 81
10. Members (no.):  40
11. Keywords:

    WOMEN                           BUSINESS
    SCHOLARSHIPS

( or ,n,Pn,X,HELP)?
```

EXHIBIT V-C. An entry in the CLUB File. Colorado Springs.

```
Program: CALENDAR
Search by which key SO (sponsoring organization),
                    ET (event type),
                    DT (date of event),
                        or X  (exit program)? DT
Date (eg 25-DEC-80)? 15-NOV-80
15-Nov-80  00:00 AM  00:00 AM  INTERNATIONAL POLKA CLUB
                    INTERNATIONAL POLKA CLUB PRESENTS "JOE GABLE". 2422 BUSCH
     DANCE          AVENUE. 633-0195. DRESS UP - NO BLUE JEANS.



Is this the record you wanted?
15-Nov-80  00:00 AM  00:00 AM  FINE ARTS CENTER
                    NEW EXHIBITION, "SAINTS AND THEIR MEANINGS IN THE HISPANIC
     DISPLAY        SOUTHWEST". 30 W. DALE. 634-5581.



Is this the record you wanted?
15-Nov-80  00:00 AM  00:00 AM  FINE ARTS CENTER
                    NEW EXHIBITION, "HIGHLIGHTS OF AUDUBON". 30 W. DALE.
     DISPLAY        634-5581.



Is this the record you wanted? Y
Date (eg 25-DEC-80)? NONE
Search by which key SO (sponsoring organization),
                    ET (event type),
                    DT (date of event),
                        or X  (exit program)? ET
Event Type? CONCERT
14-Nov-80  08:00 PM  00:00 AM  THE SYMPHONY, COLORADO SPR
                    FEATURES JULIANA MARKOVA, FAMOUS PIANIST. PALMER
     CONCERT        AUDITORIUM. $6.00 AND $8.00. CALL THE SYMPHONY OFFICE AT
                    633-4611.


Is this the record you wanted? Y
```

Exhibit V-H. Partial listing of CALENDAR File. Colorado Springs.

```
Program: DAY CARE


  N  -  Search by Name of Center
  E  -  Search by Closest Elementary
  F  -  Search for Flagged data (enter 'LIST F' to list Flags)
  S  -  Statistic printout  ( for DCREAD only )
  X  -  Exit the Program

? N

Which center do you want? C


     Director: TYSON BARBARA
     Center:   CALVARY PRESCHOOL
               4210 TEMPLETON GAP
               COLORADO SPRINGS, COLORADO        80918
     Telephone:599-7262                      No TITLE XX
     Closest elementary:
     License expires:                Accepts 228 children   Has 33  vacancies
     Ages  3  to 6
     Open from 09:00 am  to 12:00 am MON, TUE, WED, THU, FRI,

     ACCEPT HANDICAPPED
     Center has   0 complaints on file
Do you want the next file? N
Which center do you want? NONE


  N  -  Search by Name of Center
  E  -  Search by Closest Elementary
  F  -  Search for Flagged data (enter 'LIST F' to list Flags)
  S  -  Statistic printout  ( for DCREAD only )
  X  -  Exit the Program

? X
```

Exhibit V-Eye. Example of search in DAY CARE File. Colorado Springs.

There are also plans afoot to provide computerized access to information on regional businesses. Information on regional and national businesses as well as information on starting a business already exist in the Library's vertical files.

ASSESSMENT OF THE FILE

The subject scope of the various files is considered by the staff to be very good. According to one, it "covers everything I've had to encounter." The currency of the files was rated very good to good, the main reservation being that updating requires more time than is available. While some of the staff rated the depth of information as very good, a few stated that the information was limited by the computer format and was not always clear.

Arrangement is not a relevant feature of on-line files, inasmuch as on-line files permit multiple access.

The adequacy of access, or indexing, was rated variously by the staff. Some judged it to be very good. Others felt that some of the keywords, especially those for CALL, needed a great deal of work in order to provide accurate and consistent access. The physical format of the file was rated very good by all staff interviewed; several said they liked working with an on-line file better than working with a hard-copy file.

E. I&R SERVICE DELIVERY

The consensus of the staff interviewed was that the majority of questions asked at the Information Services Desk call for short answers delivered quickly. The staff try to provide the patron with all applicable resources, although sometimes recommendations will be made to help the patron narrow the number of choices. To answer questions the staff may also use the Yellow Pages, a local directory of social services in Pikes Peak, and information published by local government. Questions requiring more than the usual time to answer (2-3 minues) are referred by paraprofessional to professional staff.

The Library, along with several other I&R service providers, at one time formed an I&R Coalition to discuss new services and those resources that need updating. While the Coalition still exists, it no loner holds meetings. Within the Library, there are meetings of the Information Services staff and meetings of ISD and Reference staffs when needed. ISD desks and staff are located near the main entrance to the library and are highly visible to entering clients. The first impression conveyed is that of a series of airline reservation desks. They have a look of a natural spot to go to to ask a question. As a result, the ISD staff answer many queries for directions within the Library. Twenty percent of all queries answered in January 1980 were of this kind.

An attendant effect of the "airline reservation desk" vista that greets the client could very well be some control over the nature of queries elicited from people who walk in. The "high volume" atmosphere may elicit mainly short-answer queries; and the rather public and congested aspect of the area may have some chilling effect on the posing of complex personal queries in person. In telephone mode, there may well be no impact of ISD's "vista."

F. EXTERNAL RELATIONS

The Community Interaction Team activity was a major effort to gather community information and make it available to the public. CIT was instrumental in advancing the Library as an "information place" and increasing its visibility. As one result, the library now serves as the formal depositary for city and county documents.

There are several specialized I&R providers in the region -- concentrating on such topics or groups as mental health and senior citizens -- and several crisis hotline services. The relationship of the Library to the other I&R agencies seems to be a positive one. Nonetheless, a few agencies feel that ISD competes with or duplicates their efforts. These feelings are somewhat ameliorated by the fact that the Library is not open 24 hours and does not do counselling or in-depth consultation with the client.

Service agencies (non-I&R agencies) in the community seem to react positively to the Library's I&R service. While some are surprised that the Library is providing an I&R service, others feel that it is a natural role.

G. ADMINISTRATION

In June 1979 the Public Services Department was created in the Library to coordinate Information Services, Reference, Circulation and all the branches. The Head of Information Services is responsible to the Assistant Director for Public Services, who reports in turn to the Director. See Exhibit V-J. Information Services Division has a distinct staff consisting of four librarians, two technicians (one is part-time) and five CETA clerical workers. All of the librarians have reference experience. One of the technicians has previous experience in social services that she considers helpful in assisting clients with the CALL file.

The Head of ISD and one library technician participated in training sponsored by the Junior League and carried out by a local I&R/hotline service provider. In turn, the Head of ISD has since provided training for all new ISD staff. It involves a general orientation to the services of the library and its personnel, use of the tools -- documents, resource files -- in ISD, and three telephone training sessions. The latter sessions focus mainly on empathy and courtesy to the patron. New employees also have a session on terminal use with a person in the Systems Office and several "labs" during which they practice interviewing and the use of terminals.

COSTS

Originally the Junior League provided the wherewithal for file development and I&R service delivery. This was done with volunteers. At that time the Library contributed one-half of a reference librarian's time, office space, and a telephone line. With the establishment in 1979 of ISD, all financing fell to the Library's regular budget. CETA workers have been used in many library departments, and approximately one-third of the staff in ISD are CETA workers. The funding for ISD is approximately $75,000 per annum. About $45,000-$50,000 of this is used for I&R-related activities. These figures do not include about $35,000 for CETA workers or charges for building, telephone and computer use.

PUBLICITY

The Junior League service, CALL, was announced to the public as "Citizen's Action line Limitless." The telephone number was "471-CALL." The name and telephone number remain the same today, and the I&R service is named simply "CALL."

Initial publicity consisted of flyers and brochures in the library, television and radio spots, bumper stickers and a listing in the telephone book. The Junior League, assisted by the library's print shop, handled the finances and management of it. Ongoing publicity has included public service announcements on the radio and newspaper and television features. Librarians from ISD also speak to community groups about I&R. The Head of ISD felt that the radio spots are the most effective form of publicty; there is a noticeable increase in calls after the spots are broadcast. There is virtually no publicity budget for I&R; it is "free" except for staff time and negligible materials. An estimate of staff time was not forthcoming.

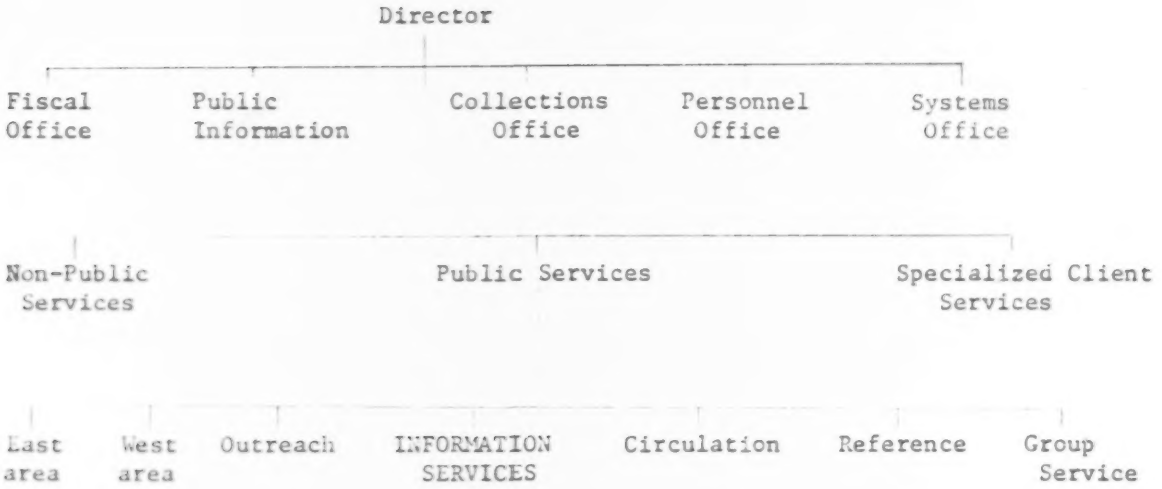


Exhibit V-J. I&R IN THE ORGANIZATIONAL HIERARCHY, COLORADO SPRINGS

HAVE A QUESTION?

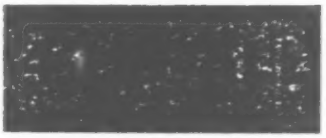
The Pikes Peak Library District's Information Center answers over 5,000 calls and patrons' questions each month. Some callers may only need to be referred to another department or agency, others may want to know the library's hours, and many need some information that's important concerning their lives.

The Information Center, both an information and referral service perfectly illustrates a new trend in library services—offering information about community activities, services and resources.

Penrose librarians have built enormous files about community services, ranging from health, legal aid, housing, transportation to recreation and education. Using these resources, stored in the library's computer, staff members can help patrons with their day-to-day questions and problems.

CALL US FOR INFORMATION ON . . .

• community organizations and services • calendar of community events • locating books you want • educational and recreational courses • colleges and careers • recorded consumer information • day care center referral • energy conservation information • taxes



GET AN ANSWER!

Exhibit V-K. Publicity Flyer. Colorado Springs.

H. I&R IN THE CONTEXT OF OTHER SERVICES

There was strong feeling among the ISD staff that I&R is an appropriate job for a public library. Other staff members who were interviewed agreed. One said, "I can't think of any other agency as impartial as a library is." Another staff member thought that, while I&R is appropriate in a library, at Colorado Springs emphasis had been given to the technology rather than to the service. However, this same person saw the emphasis beginning to shift to the service, now that all branches were on-line. Nonetheless, staff who were working at the Library when the CALL project began stated that the I&R service has changed since the beginning. Now there is less probing for the client's underlying need and very little follow-though. They attributed this change to scarcities of money and staff.

Several staff members -- from ISD and elsewhere -- were certain that the professional staff, generally, were becoming more positive in their view of I&R in the Library. Initially there had been some staff resentment about money being spent in establishing ISD and the resource files. That resentment appeared to have been due at least in part to all the changes going on in the library -- new departments, reorganization, and new computer technology.

The Library's top management is committed to providing the public with the information it requires, in whatever form it is available. The I&R service has helped promote among the public the realization that the library handles not only the information contained in documents, but also information from other sources. The director feels that the "library is a perfect place to do I&R..." Information Service and Reference have been two separate departments since the establishment in October 1979 of the Information Services Division. At the time of interviewing for this study, it was clear that the separation was creating problems in both departments in terms of defining their separate responsibilities. For instance, some reference staff members stated that ISD was getting the "glory' and Reference was overworked. Perhaps reflected in the strained relationship was the definitional dilemma that has faced this study since the beginning: reference and I&R overlap so much that distinguishing one from the other with certainty may be impossible. It seemed particularly important to the staff of the Reference Department that definitions of mutually exclusive responsibilities and the roles of the two departments be clearly established. The staff as a whole viewed I&R as connecting people with resources outside the library and reference as using traditional library resources. While some of the staff stated that they could understand the division between Information Services and Reference, most felt that there was and should be considerable overlap. The heads of both departments felt that, while there should be some division in staff duties, a team approach to giving all types of information would be less confusing to patrons.

Since the study team interviewed the staff in Colorado Springs, management has begun assigning both ISD and reference staff to the three reference desks. Moreover, ISD counters and terminals have been moved to the Reference side of the building, thereby effecting a physical -- if not organizational -- merger if the two departments. Reports indicate that this has alleviated some of the problems noted above.

I. EVALUATION

ISD regularly collects statistics on the number of directional questions, number of information questions that involve a search, and the number of questions that come in on the 471-CALL number. These types of questions are tallied by pressing three different buttons on the terminals. The statistics tally sheet present the many and varied statistics that are gathered at ISD. See Exhibit X-L.

The main impact of I&R on the public seems to be the change it has wrought on the image of the Library as a place for information. One librarian expressed the opinion that ISD is reaching different people and making them less afraid of the Library in general; therefore the use of all services should increase. Another librarian agreed and stated, "CALL put us on the map."

The top managers felt that many changes in the Library have impacted positively on the public's image and that I&R has been one of the most important of those changes. The Library's community involvement, through CALL and CIT, is considered to have been a contributing factor in getting a one-half mill levy increase in November 1978.

TRANSACTION SURVEY

The ISD staff attempted to interview all Penrose Library clients who asked I&R-type questions in March, April, and May, as well as two days at the end of February. Two hundred and eighty-seven completed interview forms were collected; nine clients refused to be interviewed; and the staff did not have the time to do twelve interviews. During this period the Reference staff was also involved in interviewing all clients who asked I&R-type questions, but completed interviews from Reference accounted for only 13% of all completed forms. In talking with staff at the end of the survey period it was learned that they were not successful in interviewing every I&R client, as the following figures reveal: during the three months ISD tallied 4690 directional queries, 7124 search queries, and 2128 queries that came in on 471-CALL. There are several interesting observations based on the simple frequencies of the data:

- When considering all days of the week in aggregate, the highest frequency of I&R inquiries occurs between 10 and noon, decreasing gradually until 9 p.m. The rank order of busiest days of the week, starting with the busiest, are: Monday, Thursday, Tuesday, Friday, Wednesday and Saturday.
- About one-half of the clients had used the I&R-type service before. (The limitations of this question were explained earlier).
- 60% of the clients had used other library services, and 75% of these had used them within the last three months ("frequent users").
- The service was learned of through sources other than those listed (52%, "Other"). The telephone book was cited 24 times; the Chamber of Commerce and walk-in were mentioned four times each. The most frequently mentioned category was "friend, neighbor, relative."
- About one-third of the clients had asked his/her question elsewhere.
- The 20-35 age group predominate among the clients.

STATISTICS NAMES FOR INFORMATION SERVICES

DATE FOR INPUT: Sept. 30, 1980

1. QUESTIONS ANSWERED-DIRECTIONAL 1379
2. QUESTIONS ANSWERED-SEARCH 3667
3. QUESTIONS ANSWERED-INFORMATION AND REFERRAL 353
(ADD 2 AND 3 FOR TOTAL NUMBER OF SEARCH QUESTIONS) 4020
4. NUMBER OF TOURS 2
5. NUMBER OF PROGRAMS-WORKSHOPS, COCIS, GIS, ETC. 1
6. NUMBER OF OUTSIDE CONTACTS 3
7. PEOPLE ON TOURS 22
8. PEOPLE AT PROGRAMS 45
9. PEOPLE CONTACTED OUTSIDE 32
10. LOCAL DATA BASE ACCESSES--ADD 14, 20, 21, 26, AND 27 2183

11. COURSES-NUMBER OF ITEMS ADDED 293
12. COURSES-NUMBER OF ITEMS UPDATED 44
13. COURSES-NUMBER OF ITEMS DELETED 213
14. COURSES-KEYWORDS ACCESSED 286
15. COURSES-AGENCIES' INPUT HOURS 0
16. COURSES-TOTAL NUMBER OF COURSES AT THE END OF EACH MONTH 2181

17. CLUBS-NUMBER OF CLUBS ADDED 7
18. CLUBS-NUMBER OF CLUBS UPDATED 26
19. CLUBS-NUMBER OF CLUBS DELETED 2
20. CLUBS-NAMES ACCESSED 729
21. CLUBS-KEYWORDS ACCESSED 114
22. CLUBS-TOTAL NUMBER OF CLUBS AT THE END OF EACH MONTH 582
22A. CLUBS-PRINTOUTS SOLD 3

23. CALL-NUMBER OF AGENCIES ADDED 15
24. CALL-NUMBER OF AGENCIES UPDATED 142
25. CALL-NUMBER OF AGENCIES DELETED 21
26. CALL-AGENCIES ACCESSED 716
27. CALL-KEYWORDS ACCESSED 338
28. CALL-TOTAL NUMBER OF AGENCIES AT THE END OF EACH MONTH 661
28A. CALL-PRINTOUTS SOLD 0

29. COCIS AND GIS PRINTOUTS 15
29A. PARTIAL CALL AND CLUB PRINTOUTS 17

30. COMMUNITY EVENTS CALENDARS MAILED 231
31. CALENDAR ITEMS ADDED 70
32. CALENDAR ITEMS UPDATED 82
33. CALENDAR ITEMS DELETED 46
33A. CALENDAR-TOTAL NUMBER OF EVENTS AT THE END OF EACH MONTH 198

44. BUSINESS INFO ADDED 105
45. CITY/STATE INFO ADDED 0

52. DAY CARE-AGENCIES ADDED
53. DAY CARE-AGENCIES DELETED
54. DAY CARE-AGENCIES MODIFIED
55. DAY CARE-TOTAL NUMBER OF AGENCIES(HOMES) AT THE END OF EACH MONTH

Exhibit V-L. Monthly Statistics for I&R. Colorado Springs.

9.

56. NUMBER OF RESERVES TAKEN AT INFORMATION SERVICES

101. QUESTIONS ANSWERED 1-3 5399
102. EVENTS 4-6 6
103. PATRONS CONTACTED 7-9 93
105. LOCAL DATABASE ACCESSES-ADD 14, 20, 21, 26 AND 27 2183

7 Agency call (answer only questions 9-12) n = 285

__ No response (answer no questions)

PUBLIC LIBRARY INFORMATION AND REFERRAL PROJECT

Branch _____
Date _____
Time _____

We're trying to improve our service. Would you help us by answering a few questions? We won't record your name and it should take only one minute.

1. Have you used the library's information service before -- the one you're using now? n = 267

   [50] Yes [49] No [1] Don't know

2. Have you used any other service of this library system? n = 267

   [60] Yes [39] No [1] Don't know

   IF YES: n = 154

   [75] Was it within past 3 months?
   [13] Was it within past year?
   [7] Was it longer ago? (Or don't remember)

3. How did you learn of the library's information service? n = 266

   [21] Friend, neighbor, relative
   [14] Library staff
   [11] Referred by an agency
   [1] Radio
   [2] Television
   [2] Newspaper
   [52] Other

4. Have you asked your question in any other places before coming to the library? (You don't have to name them.) n = 266

   [35] Yes [65] No

5. I'll read some age groups. Just stop me when you hear yours. [Interviewer: Omit obviously wrong groups when possible.]

   n = 267

   a[5] 13-19
   b[52] 20-35
   c[25] 36-45
   d[17] 46-64
   e[5] 65 or over
   [7] Declined to state

6. I'll read some groups based on years of education completed. Just tell me when you hear yours.

   n = 267

   a[26] College graduate
   b[35] Some college
   c[26] High school graduate
   d[5] Some high school
   e[2] 8th grade or less
   [2] Declined to state

7. In which of these groups did your total family income, from all sources, fall last year -- before taxes, that is? I'll read the groups.

   n = 267

   a[22] Up to $8,000
   b[25] $8,000 to $14,000
   c[21] $14,000 to $20,000
   d[12] $20,000 to $26,000
   e[13] Above $26,000
   [7] Declined to state/don't know

That's all the questions. Thank you very much for your help.

INTERVIEWER TO FILL OUT REMAINDER:

8. Sex of patron n = 265

   [29] Male [71] Female

9. Mode of inquiry n = 280

   [86] Telephone [13] Visit [1] 2+A checked

10. Topic of question (check all that apply) n = 277

    [6] Money matters
    [13] Consumer issues
    [4] Housing/hshld. maint.
    [4] Health
    [13] Job-related issues
    [3] Transportation
    [14] Education
    [3] Neighborhood issues
    [7] Recreation, sports
    [2] Family relations
    [2] Crime & safety
    [3] Legal matters
    [1] Child care
    [36] Other

11. Disposition of question (All that apply)

    n = 278

    [37] Information was given
    [13] Information was given after interview to probe underlying need
    [3] Librarian contacted a resource on patron's behalf
    [1] Other (Specify)

12. Was question answered (or referral made) from a resource file created by the library?

    n = 273

    [44] Yes [56] No

Exhibit V-M. Survey results, Colorado Springs.

93

Day of the Week: n=275

Sun	1	Thurs	20
Mon	25	Fri	16
Tues	18	Sat	8
Wed	12		

Typology of Education and Income: n=246

Low educ, low income	10
Low educ, hi income	7
Hi educ, low income	40
Hi educ, hi income	43

Exhibit V-M. Survey results, Colorado Springs (cont.).

- About two-thirds of the clients have at least some college education.
- 25% of those interviewed reported a family income in the $8,000 - $14,000 range; the median income falls into the range of $14,000 - $20,000, commensurate with the 1976 median income in El Paso County of $12,900, after allowing for inflation.
- The great majority of clients interviewed were female.
- 66% of all queries were by telephone.
- In the great majority of the cases, "simple information-giving" was provided. The staff rarely contacted a resource on the patron's behalf.
- CALL, CLUB, COURSES and CALENDAR were used less than half the time in responding to a patron's I&R query. (DAYCARE did not exist at that time.) It is assumed that externally-produced directories were used in most instances.

Of the 500 cross-tabulations that were performed, the following seemed meaningful ingful for Colorado Springs:

- People who are regular and frequent library users are more likely to choose the library as the first place to ask their question.
- Although there are more females than males in the survey, the males who use the service tend to be college graduates more often than the women do.
- There is a tendency for the staff to use one of the resource files more often for questions about housing/household maintenance and neighborhood issues than for other topics.
- Correlating the topics of the queries with other variables, there is indication that males tend to ask job-related questions and females tend to ask about consumer issues.
- Younger people tend, more than others, to have learned of this service from a friend, relative, or neighbor. Those clients with "some high school" also tend to have learned from a friend, neighbor or relative more than those in other education categories.

The composite typology of education and income showed several relationships. Those clients with lower education, no matter what their income, tend to ask questions for which the staff turn to one of the four community information files to answer. Also, these questions tend to fall into the housing/household maintenance category.

STAFF ASSESSMENT

The consensus among staff and managers was that the major problem in ISD is the lack of permanent staff. (CETA workers change every September.) Having a permanent staff would allow for deeper and longer-term training. The lack of space and privacy for the interview and training in the interview were stated as obstacles to doing any true referral or advocacy. Both Reference and ISD staffs felt that a larger, permanent, professional staff in ISD would allow for more integration of the two services and a more even level of service delivery.

Some staff felt hindered in providing I&R by virtue of the separation of the resource file into five sub-files. The head of ISD felt that if all files were combined into one, full Boolean logic could be used to access it. ("AND" can be used now in each separate file.) However, a merger would require that new capabilities be added to the Library's equipment -- namely, a "data-base manager" program. The director felt that it would be satisfactory to use separated computerized files until such software becomes available at an affordable cost.

ENDNOTES

1. Community Planning and Research Council. The Pikes Peak Library in the 1980's: A Plan For Development, Colorado Springs: Community Planning and Research Council, 1979.

2. U.S. Department of Commerce, Bureau of the Census, United States Census of Population: 1970, vol. 1, Characteristics of the Population.

3. Pikes Peak Area Council of Governments, Development Framework for the Pikes Peak Region, 1977, Colorado Springs: Pikes Peak Area Council of Governments, 1977.

4. The Pikes Peak Library in the 1980's: A Plan For Development, Colorado Springs: Community Planning and Research Council, 1979.

5. Penrose Public Library, "What is Information Services?" Colorado Springs: Penrose Public Library. 1980 (computer printout).

CHAPTER VI

DALLAS

A. THE SITE

THE CITY

The City of Dallas: an urban center in northeast Texas projected at 940,000 people in 1985 and surrounded by surburban communities in Dallas County that may contain another 850,000 at that time;[1] a center laced with expressways and dotted with empty lots and large construction projects; perhaps the greatest economic strength of any city in the nation, in terms of per capita income, owner-occupied housing, economic diversity, personal savings and employment rate;[2] an economic base built on banking, insurance, electronics, transportation, marketing, communications; an educational center for the region, with 12 institutions of higher education located within 50 miles.

The population of Dallas seems not to be exceptional. It is expected that as the population of the United States ages and increases slightly in educational level, as families shrink, as more women enter the work force, as elementary and secondary school populations fall off -- as these trends are realized in the country as a whole, so too will they be the case in Dallas. The population of Hispanics and blacks -- recently estimated at about 40% of the city's population -- has been growing slightly in proportion to other groups.[3]

THE LIBRARY

The Dallas Public Library serves the population of the City of Dallas through a central library and 18 branches. Construction of a new $40 million central building is currently underway and is expected to be ready for use in 1982. Traditionally, the Library has been funded at a moderate level when compared with the libraries of other major cities around the country. Due to Dallas' general fiscal strength, however, it is possible that Dallas Public Library will retain its fiscal viability in a period when the library budgets of other major cities will be severely challenged. The proposed operating budget for fiscal year 1981 is about $8 million.

The Library is a department of the municipal government directed by a professional librarian and advised by a board of citizens appointed by the mayor and the City Council.

B. ORIGINS OF I&R

In the late 1960s staff of the Dallas Public Library (DPL) had begun the Inventory of Community Services, a small card file of groups concerned with social issues. In 1971 DPL cooperated with the Chamber of Commerce and the Goals for Dallas Office in compiling a Continuing Education Directory. Interest in local resources had grown enough among the library staff by 1972 to warrant formal attention, resulting in a Staff Committee Report. In brief, the recommendations of the Report were that DPL should undertake a comprehensive I&R service operation that would serve directly, through 24-hour telephone or walk-in contact, all the citizens of greater Dallas (the City and the surrounding County). The Staff Committee were apparently influenced by certain publicized efforts to address personal and social problems through information: the Bay Area Reference Center (San Francisco Public Library), the Public Information Center Project (Enoch Pratt Free Library), and the "Help" directory (Baltimore County Public Library). At about the same time, interest in identifying the community resources in Dallas was growing outside library circles and in 1972 the Greater Dallas Planning Council funded the development and publication of a directory of community resources. The Council called on DPL to do the work, and in 1973 the Directory of Urban Organizations in the Public Metroplex, a classified and indexed directory of between 1500 and 1800 organizations, was published. The first edition of a popularized version of the Directory -- Open Dallas -- was published in August of 1974 under the aegis of DPL and the Greater Dallas Chamber of Commerce.

The various experiences with developing directories did several things: they provided for Library staff considerable practice in building, maintaining and organizing large files of community resources; they established the Library as a credible overseer of such files; and they eventually convinced the staff of DPL that data processing equipment was necessary to handle a file the size and complexity of a comprehensive Dallas resource file. In 1974-76, with the cooperation of the Dallas County Community College District, the existing files were put into computer format, using "A Programming Language" (APL). The file was named "APL/CAT," standing for "A Programming Language/Community Access Tool." From the APL/CAT file Library staff produce the editions of Open Dallas, provide custom-made lists of Dallas resources on demand, print mailing labels on demand, publish specialized lists of resources for broad distribution, and answer queries from clients through on-line and microfiche access to the file. All of these activities are known as APL/CAT services.

C. THE I&R SERVICE CONCEPT

The origins of I&R in the Dallas Public Library reveal much about how the service is currently conceived and delivered. Looking back to the Staff Committee Report of 1972, a certain schizophrenia is apparent. While the Report specifically recommends direct I&R services to all the citizens -- including 24-hour service and regular follow-up -- the Report also says

> It is recommended by the Committee that the Dallas Public Library assume the responsibility of establishing and maintaining a clearinghouse for all information and/or referral agencies in Greater Dallas. 4 (our emphasis)

Staff were uncertain whether to play the role of I&R file producer -- a support role -- or the role of direct I&R provider, or both. The orientation toward playing a support role possibly grew out of the early involvement with producing directories.

In its earliest days APL/CAT was oriented toward professionals, business-people civic leaders, social planners, and the general citizenry for their use in solving the community's social problems and enriching the life of the community. Rather than being viewed as a direct link between "everyman" and the various resources of Dallas, APL/CAT was designed to link various formal and informal leaders among the citizenry to those resources, and thereby to serve all the people indirectly. While there was no intention that the file should be accessible exclusively to the leaders, it was designed and promoted primarily with them in mind. Nor was APL/CAT strongly oriented toward the disadvantaged population of Dallas. To the contrary, the file emphasized enrichment opportunities -- cultural, educational, recreational -- that would supposedly appeal to the middle socio-economic levels.

The appearance of Open Dallas in 1974 altered this orientation somewhat in that it was intended for use by the general citizenry. Yet even then the staff of the Library saw themselves as file builders rather than I&R providers; and today the staff are still ambivalent in viewing the Library as an I&R provider, as opposed to a file builder and an answerer of reference queries.

A large reason for playing a primarily supportive role in I&R from the beginning -- and, in fact, in not labelling their I&R activities "I&R" -- has been the fact that a successful I&R service was already in operation. The Greater Dallas Community Council had been providing I&R related to human services for years, and the administration of DPL decided to support the Council activity with a sound base of information about community resources, rather than compete with the Council in providing I&R directly to the client. To this day, the staff of DPL tend to refer inquirers who require human services to the Community Council.

Gradually, the use of APL/CAT by non-affliated people -- people representing their own needs, not the needs of a group they are a part of -- has increased, staff say. Improvements in the format of and access to the file and publicity has helped to attract the custom of the individual qua individual. Today, individual use far outstrips organizational use. Even so, much of the promotion of APL/CAT is directed toward community leaders, as is evidenced in the following published list of the uses of APL/CAT:

> For information and referral services to the public
> For information on services currently available, that can be used in planning for new or expanded services

For up-to-date mailing labels for program announcements and other mailings
For locating other organizations with similar objectives or services so as to develop cooperative programs
For basic information to use in general planning and coordination activities
To locate speakers, films, agencies offering consulting services, or workshops on particular topics
To aid in meeting requirements for citizen and interest group involvement in planning processes. [5]

The origins of APL/CAT are apparent in the mix of services offered today.

There are three I&R services that are performed regularly by DPL staff. These three could be considered to constitute virtually the total I&R program of Dallas Public Library: simple information-giving; complex information-giving; and constructing a file of outside resources that the public can use. Among the three, the last is the primary focus of I&R at DPL, and it takes on a variety of forms:

- DPL maintains its own complete file of outside resources, on-line, for on-demand inquiry
- DPL publishes subsets of this file, such as Open Dallas; custom-made lists for non-profit organizations such as child care facilities (corporations pay for such lists); standard lists on topics of ongoing interest, such as service clubs, women's groups or minority groups; and mailing labels.

Other I&R service components present either irregularly -- some staff do and some staff don't -- or not at all. The secondary services of advocacy, counselling, escort and transportation are not offered at all. Other services may be provided, depending on the particular staff member's inclination: referral, in the sense that it is used in this study, is rarely, if ever, done. Likewise, advising on resources or on strategies of dealing with a situation, and follow-up. Formal feedback to planners, politicians, social agents, etc. is provided to the extent that listings, both standard and customized, are provided for their use in assessing the resources available to Dallas residents. However, feedback on I&R intake or on agencies' responses to clients' needs is not provided. The Library has shared its resource file with other organizations, but other than this the staff have not been active in assisting other agencies in building or maintaining their files, or in bringing together the region's I&R providers.

D. THE RESOURCE FILE

Work on the actual APL/CAT file began in October 1972, under funding from the Dallas Citizens' Council. The then Community Education Coordinator has responsibility for its development. With her worked a full-time professional librarian, an editorial specialist, and three to four part-time paraprofessionals. The work of collecting the information for the file and for the subsequent publication, the Directory of Urban Organizations in the Dallas Metroplex, took between three and four months. Actual publication required another two to three months. The Directory originally contained between 1500 and 1800 entries. Currently there are approximately 6000 entries in the APL/CAT file.

In the Directory -- known affectionately as "The Big Orange Book" -- there was an attempt to list each service program of each agency to a fine degree of specificity; and entries were classed very broadly, with no keyword or other indexing access. Since then, the file has changed in major ways. First, while still computer-based it is accessed through a microfiche edition, which permits more frequent updating and easier duplication of the file than a paper directory. Second, the entries have become somewhat shorter, with less detail about the services available from each resource. Third, access to the entries has been augmented by a keyword index, which effectively expands the services available to the user.

The APL/CAT file is available at the central library and at three branches spaced evenly around the Dallas area. The public may gain access to the file either by telephone, walking in or -- infrequently -- by mail. If they walk in, they have the choice of consulting the file directly, by using the microfiche copy of the file, or indirectly, through a member of the staff. The staff will ordinarily use the microfiche format. Staff at the central facility, when requesting custom-made lists of resources, may use one of the two terminals that are tied on-line to the data base.

Several agencies around the City subscribe to the microfiche form of the file ($350 per annum) and make it available to, or use it with, their respective publics. In 1980 there were ten paid subscriptions, including four public libraries outside the DPL system.

A major spinoff of the APL/CAT file is Open Dallas, a compendium of information "most wanted by individual," selected from the totality of the APL/CAT file and published in a popular format. It is available in all the branches of DPL, in many agencies and organizations around the city, and is sold at the airport, major bookstores and at community events. While it is not the fullest or most current guide to the city's resources, it reaches the public through more direct channels than does APL/CAT. Three thousand five-hundred copies of the last edition have been sold.

The entries included in APL/CAT are the standard human service agencies, governmental agencies and non-profit enterprises (such as thrift shops and Goodwill Industries). In addition the file contains:

- Churches that provide emergency services to other than their own congregation
- Clubs and associations that provide some sort of community service

- Hobby and vocational interest groups
- Hard-to-find services or goods available through commercial establishments (for example, for-profit child care serving an otherwise unserved area)
- Political and civic organizations.

At one time the file included current recreational and entertainment events. Recently, however, new local publications have been providing adequate coverage of such events, and APL/CAT has abandoned this category.
Excluded are:

- Groups with a primarily convivial or fraternal focus rather than a topical or service orientation
- Resources which are already accessible through coordinating groups or agencies. Example: neighborhood garden clubs available from the Dallas Garden Center; chapters of service clubs with a central office
- Profit-making groups except in the case of unique services. Example: Pet Detective Agency of North Dallas and Park Cities is included, but not all pet shops are. Exception is also made in cases where exclusion of for-profit organizations would distort an overview of the available resources, as in the case of child care centers.

For each entry, the staff attempt to provide the following information:

- Name, address and phone number of the resource agency
- Service description
- Name and title of contact person and person in charge
- Whether federal, state, local or private service
- Source of financial support: local, state or federal
- Hours open
- Area served
- Eligibility requirements and how to obtain service
- Service capacity
- Meetings
- Speakers available
- Publications
- Keywords.

On-line, of course, the file is accessible by way of either the keywords that are used to describe each entry, by way of the name of the resource, or by way of broad class heading (such as "health"). However, on-line access is available to the public only by calling or visiting the key I&R staff at the central library. The major access to APL/CAT is through the microfiche file. Its main arrangement is a classed order employing a UAWSIS I (United Way of America Services Identification System I) scheme that has been modified over the years. Originally, the classed arrangement was chosen over other possibilities because "we were just used to classifying everything in libraries." It is retained because it offers a broad overview of the resources in the Dallas area, by simply scanning the file.

The main arrangement of the microfiche file is augmented with a controlled keyword index and an alphabetical index by agency name. A given resource may

be indexed by as few as one keyword and as many as 40, aside from its name. Information about a resource is collected over the telephone in most cases. Where an agency is particularly complex and offers a large menu of programs a personal visit may be deemed necessary. In cases where the resource staff resist participation, the Library may send out a questionnaire to collect the information.

Updates, too, are usually performed over the phone. Each resource is updated at least once a year on a continuous basis, or more often if the need for a change becomes apparent. A new microfiche edition is issued every six months.

As has been stated earlier, the file is used for direct I&R service to individuals. The overriding objective for the file, however -- even though it may not account for as much as 50% of its use -- is to provide overviews of Dallas' resources for the community's formal and informal leaders. What might be a residual use of resource files in other libraries, at DPL is the major purpose of being. What in other places is the main purpose for the file -- I&R to the individual -- remains in spirit if not in actual count somewhat a residual benefit in Dallas.

The file has been used for other reasons, too, on occasion: identifying appropriate agencies as candidates for DPL deposit collections; community development work; sources of speakers and candidates for committees; and budgeting (identifying the resources of the community).

In aggregate, staff reactions to the APL/CAT file in its microfiche format -- the most complete form available to the front-line staff -- is that the file is adequate but in need of considerable improvement in order to be optimally useful. In subject scope, there are a few lacunae -- for example, non-denominational singles groups. Also, the rationale for inclusion and exclusion is not clear to all staff. The currency of the file is generally seen as satisfactory; however, the staff who rely on Open Dallas may find the outdatedness of this published form of the file to be frustrating in their I&R work.

The classed arrangement of the file seems appropriate to the people who have organized and maintained the file. However, several working front-line staff view it as an "unnatural" kind of organization. Use of the file is further frustrated by the fact that the surest way to access a known agency is through the index and then, by using a numerical identifier, to the classified main file. This requires a two-step process in order to access information about a known agency; whereas a simple alphabetical arrangement of entries by agency name would provide a familiar kind of one-step access. "One is inclined to use only the information given in the index -- i.e., the phone number -- rather than take that extra step." The physical format -- its being on microfiche -- is viewed with equanimity by many staff. On the other hand, several of the reference and I&R staff see this particular format as "awkward" and "slow." To a few people the major impediment is simply not having enough microfiche readers and fiche sets at the service points where they are needed. To the others expressing a problem, the mechanical elements of the microfiche themselves slow service.

Some staff would like more depth of information on certain resources, such as more detail on staffing or on eligibility requirements; but there is general satisfaction with the detail of entries.

There is considerable dissatisfaction with the keyword indexing. On the whole, it is seen by both administrative and front-line staff as somewhat less than adequate, in that there need to be more cross-references, additional control of the vocabulary, and greater specificity in some areas. Some staff also noted the need for more instruction in the use of the keyword index, inasmuch as their professional training had not included it. People instrumental in the development of APL/CAT say that they had not anticipated the complexity of indexing human services and community activities through a keyword system using "broader," "narrower," and "related" terms; and that this may be at the root of some staff dissatisfaction.

E. I&R SERVICE DELIVERY

The staff who actually provide answers to clients' questions are more likely to see their work as "reference work" rather than a combination of "reference" and "I&R," even when they *are* doing some I&R. This must be attributed to the fact that "I&R," per se, has a low profile in DPL: that there has been little formal system-wide orientation toward I&R, that the continuing emphasis of the APL/CAT activity is on serving community leaders, that the full APL/CAT fiche set is available only in four library sites, and that the term "I&R" is not commonly used to describe I&R activities. Despite the lack of prominence of I&R *as a concept* in DPL, I&R does occur, albeit in a small proportion at the central library and fractionally at the branches surveyed.

In providing I&R at DPL, as at other sites, the "official" resource file -- APL/CAT -- is not the only one used. Of course, *Open Dallas* is used at those locations where the fiche set is not available. Surprisingly, however, *Open Dallas* is used more frequently than the fiche set even at sites *with* the fiche set. This could be due to any of the limitations in format noted above. A variety of other "files" not produced by DPL are used to augment the fiche and *Open Dallas*: the white and yellow pages of the phone directory; assorted state and national directories; a newspaper clipping file; and a directory of health services. It is estimated by the I&R providers who were interviewed that they have used anywhere from 10% to 25% of the entries in the APL/CAT fiche file.

F. EXTERNAL RELATIONS

COMMUNITY INVOLVEMENT

The involvement of the citizens of Dallas in the planning and operation of DPL's I&R activities has been through formal community groups. The Citizen's Council of Greater Dallas, the Greater Dallas Planning Council, the Action Center (City of Dallas), and the Chamber of Commerce figured most prominently.

AGENCIES

DPL has held membership in assorted I&R councils and committees, such as the Coalition of Telephone Counselling Services; and the DPL I&R staff met periodically with selected groups -- such as the school district or mental health providers -- to discuss the resources that these groups have to offer. The feeling among the staff is that relations between DPL and the resource agencies are sound and that this is in part attributable to the fact that DPL does not advertise its I&R service as "I&R." The resource agencies and the non-Library I&R agencies in the region seem to be happy with DPL in the support role of maintaining a file for the direct or indirect use of the agencies. Some principal DPL staff argue strongly that the agencies would be displeased if the Library appeared to be providing I&R service of any consequence.

G. ADMINISTRATION

The person who directly oversees the DPL's I&R operation is the Community Information Librarian. This position relates to the hierarchy of library administration as displayed in Exhibit VI-A.

City manager

/

Library Director

/

Associate Director, Public Services

/

Chief of Central Library

/

Assistant to Chief

/

Head of General Reference Division

/

COMMUNITY INFORMATION LIBRARIAN

Exhibit VI-A. Organizational Level of the Community Information Librarian, Dallas Public Library, 1980.

The primary responsibilities of the Community Information Librarian are to collect information for APL/CAT, maintain the on-line file of APL/CAT data (including its indexes), prepare and distribute new editions of the microfiche, provide information for editions of Open Dallas and publicize APL/CAT services. She holds a staff relationship to the personnel who provide information services at DPL. The "I&R personnel" are actually the regular reference staff at the various service points throughout the system. The division of responsibility at the moment is quite clear. The Community Information Librarian, along with two volunteers, is responsible for work behind the scenes -- everything related to the construction, maintenance and distribution of the resource file. The reference staff are responsible for dispensing I&R service. An important exception to this division, however, is the fact that the Community Information Librarian will attempt to answer an I&R query that a member of the reference staff has been unable to answer and is responsible for all custom-made directories of resources. There is now forming a plan for the reference staff to become involved in the work of data collection and file maintenance, in order to involve them more in the total work of I&R and thus, it is hoped, heighten their awareness of the resource file and the I&R needs of people. The Community Information Librarian and the volunteers working with her have no formal training in I&R or in the human services field. Generally, the same is true of the reference staff who are providing I&R. The training and experiential orientation of those involved with I&R could be equated with "standard Librarianship." The I&R service of Dallas Public Library has ground out of that background, with a boost from some in-service I&R training. The training has been limited to occasional presentations of APL/CAT at staff meetings and short training sessions with small groups of staff who requested it. There has been no system-wide effort to train the total staff to use APL/CAT. However, the Community Information Librarian has recently been moved from an administrative outpost to the reference area of the central library. Here it is expected that training opportunities will increase. As well, there is some pressure from certain branch staff for substantial training in the use of APL/CAT and Open Dallas and in I&R work in general. It is clear that all staff in any way connected with I&R -- including administrative staff -- feel a serious lack of training in providing APL/CAT services.

COSTS

The Greater Dallas Planning Council granted to DPL $12,000 in 1972 to produce the "Orange Book." This launched the construction of the resource file that eventually became APL/CAT. The grant was expended on supplies, printing, computer time and some staff time. The total ongoing costs for DPL's I&R service are difficult to account, as is the case at most other sites. The personnel costs are absorbed in the budget -- the only paid staff member assigned wholly to I&R being the Community Information Librarian. Over the past three years DPL has received from the North Central Texas Council of Governments between $25,000 and $30,000 to expand and maintain the resource file. In addition, subscriptions to the microfiche have yielded about $3,000 per year, and the sales of mailing labels and specialized lists of resources has yielded between $3,000 and $3,500 per year. These revenues have defrayed the direct costs of APL/CAT in the past few years except for personnel and an additional $5,000 spent

out of pocket to cover a computing bill in the last fiscal year. The personnel resources used in providing service are not included in this very rough accounting of APL/CAT.

The APL/CAT operation is clearly not self-supporting, even though at the outset this was hoped for. Now it is not foreseen that the revenues from APL/CAT will ever wholly sustain it. We may estimate very roughly from the information above that the annual cost of APL/CAT support (that is, excluding the staff costs of directly serving the client) may be in the range of $60,000 to $65,000. This does not include space, utilities and other institutional services resources.

PUBLICITY

The initial publicity of the APL/CAT service was characterized by interviewees as "not a media blitz." In fact, it appears that there was no actual announcement of the birth of APL/CAT. The publicity simply called the public's attention to APL/CAT's existence. Inside the library the standard media were employed to bring public attention to the new service: posters and signs, bookmarks, brochures. Outside the library, newspapers carried occasional question-and-answer columns and articles featuring APL/CAT, radio stations broadcast some public service announcements, and there were a few short features and talk-show appearances on local television. An important feature of the publicity campaign -- important, given the nature of APL/CAT, was a direct mailing to corporations with employee assistance programs and to motels and hotels that catered to professional organizations. During the early period, the total publicity effort was waged by the Public Relations Department of DPL with their regular staff. Some of the money granted originally by the Greater Dallas Planning Council was expended on initial publicity; but it is not known at the present time how much that expenditure was.

Since the initial publicity, APL/CAT has continued to be promoted in fundamentally the same ways, and publicity has been largely the responsibility of the North Central Texas Council of Governments. There is no specific budget for publicity, as such. Staff claimed that the newspaper has provided the most effective channel of promotion, in terms of eliciting the greatest number of queries from the general public. Direct mailing to corporations has yielded respectable response from businesses.

H. I&R IN THE CONTEXT OF THE TOTAL LIBRARY

Of the seven national sites, Dallas Public Library's "I&R" is the least integrated with other library services. The staff who provide the I&R service and who manage the APL/CAT file are generally distinct from the regular reference staff. The APL/CAT fiche file, while available to the general reference staff and the staff in the Business and Technology Section is not available in other subject departments there. The full APL/CAT fiche file is housed only in the Central Library and three of the seventeen branches. Staff in the various branches are by and large untrained in the use of APL/CAT and unoriented to I&R service. Symptomatic of this is that in the branches there seems to be no commonly held idea of what I&R is, whereas the staff who are intimately connected with I&R seem to share a common idea of I&R. As a service idea and a service activity, I&R is a misty concept to most of the professional staff we talked with.

The associate Director of DPL draws a distinction between an "urban information center" and "information and referral" and says that DPL is leaning toward the urban information center concept: "the collecting and organizing of information in many forms and the subsequent matching of the client with materials and information." DPL's newspaper index, computerized bibliographic data bases and traditional library materials are also part of the "urban information center" concept. Some of this concept overlaps with the idea of I&R. However, it excludes -- and this, he says <u>should</u> be excluded from the mission of a public library -- making actual referrals to outside resources, transporting or escorting people, or making qualitative judgments about the available services. To a large extent such a distinction echoes the popular professional sentiment against librarians' assuming the role of "social workers" -- meaning, perhaps, the role of probing to identify a client's underlying needs -- that was apparent among several of the staff and the Director.

I. EVALUATION

No data are continuously collected about I&R service or the use of the APL/CAT file and its spinoff, Open Dallas. Since September 1979 the staff have done some "informal sampling" of the

- number of I&R queries, as distinct from other queries
- the topics of the I&R queries
- the search strategy used by the staff in answering I&R queries: whether they used the APL/CAT alphabetical listing or keyword index, or used Open Dallas in answering the queries.

TRANSACTION SURVEY

Data on I&R transactions were collected at Dallas Public Library from February 20 through June 24, 1980. The staff at the central library and the three branches designated as full APL/CAT branches -- Lancaster-Kiest, Skyline and Walnut Hill -- were instructed to collect data on every I&R transaction, excluding any request by title for a directory. During the survey period, 397 I&R transactions were reported. Data were collected on 394 of these. The four surveying units counted the following I&R totals:

	I&R queries
Central	377
Lancaster-Kiest	2
Skyline	11
Walnut Hill	7
Total	397

Exhibit VI-B. I&R Queries, Dallas

In addition, during this period there were 34 requests for custom printouts from the APL/CAT data base.

Comparing reference statistics -- excluding directional queries to the extent possible -- with I&R statistics during the period of the survey, the volume of I&R is about 1/70th the volume of reference activity. See Exhibit VI-C.

	I&R Queries	Reference Queries	I&R as % of Reference
Central and the 3 branches	397	30701	1.3%
Lancaster-Kiest	2	447	.4
Skyline	11	626	1.7
Walnut	7	1120	.6

Exhibit VI-C. I&R and Reference Activity Compared, Dallas.

The frequencies for the Dallas survey are displayed in Exhibit VI-D. Among the major observations that can be made are the following:

- About half of the I&R clients have used the I&R service before
- Almost 3/4 of the I&R clients have used other library services before, and over half of these could be considered frequent

users of the library's services.

- The most often cited source for learning of the I&R service is "other," including the phone book and "have always known about it" as the most commonly mentioned sources. "Other" is followed by "friend, neighbor, relative," "referred by an agency," and "newspaper."
- The educational level of I&R clients tends to be slightly higher than at other sites. Over 3/4 of them claim at least some college eduation.
- Likewise, the family income appears to be marginally higher than in other sites.
- Inquiries by phone account for 93% of all I&R inquiries.
- Out of 382 transactions, library staff contacted a resource on behalf of a given client in only one case.
- Nearly 90% of all I&R queries are answered from the library's resource file -- APL/CAT or Open Dallas.
- People posing job-related queries, more than other people, tend to have learned of the service from a friend.
- Younger people, as we might expect, ask proportionately more education-related queries.
- For recreation and sports queries, compared with other types of queries, the staff are more likely to use the library-created resource files.
- People who pose family relations queries are more likely to to have learned about the service from an agency; they are more likely to have posed their query elsewhere.

Of the many crosstabulations of transaction data, using the simple variables and the education-income typology, the following appear to have the most meaning in explaining patterns of client use and staff performance:

- An inquiry about recreation and sports is less likely to to come from an agency than from a private citizen.
- The response to an agency call is more likely to be something other than simple information-giving -- something such as complex inofrmation-giving or referral.
- There is a tendency for those clients in the income categories of $14,000 and up to have used the I&R service before. This finding is supported not only by the cross-tabulations of the simple variables, but also by the Typology. Interestingly, high education levels appear not to be associated with prior use of I&R.
- The frequency of use of the library's services is highest among the youngest age group and drops steadily to the lowest point in the oldest age group.
- Those in lower income groups are slightly more likely to have learned of the I&R service from an agency.
- The staff are slightly more likely to use the library-created file if a client's query had been asked elsewhere first.
- Expectedly, men tend to present more recreation and sports queries;

[71] Agency call (answer only questions 9-12)

__ No response (answer no questions)

PUBLIC LIBRARY INFORMATION AND REFERRAL PROJECT

Branch _____
Date _____
Time _____

We're trying to improve our service. Would you help us by answering a few questions? We won't record your name and it should take only one minute.

1. Have you used the library's information service before -- the one you're using now? N = 311

   [51] Yes [47] No [2] Don't know

2. Have you used any other service of this library system? N = 310

   [74] Yes [25] No [1] Don't know

   IF YES: N = 244

   [57] Was it within past 3 months?
   [25] Was it within past year?
   [17] Was it longer ago? (Or don't remember)

3. How did you learn of the library's information service?

   [26] Friend, neighbor, relative N = 310
   [9] Library staff N = 310
   [13] Referred by an agency N = 310
   [10] Radio N = 308
   [3] Television N = 309
   [13] Newspaper N = 310
   [36] Other N = 310

4. Have you asked your question in any other places before coming to the library? (You don't have to name them.) N = 311

   [51] Yes [49] No

5. I'll read some age groups. Just stop me when you hear yours. [Interviewer: Omit obviously wrong groups when possible.] N = 311

   a[4] 13-19
   b[39] 20-35
   c[20] 36-45
   d[5] 46-64
   e[5] 65 or over
   [2] Declined to state

6. I'll read some groups based on years of education completed. Just tell me when you hear yours. N = 310

   a[43] College graduate
   b[35] Some college
   c[14] High school graduate
   d[5] Some high school
   e[1] 8th grade or less
   [1] Declined to state

7. In which of these groups did your total family income, from all sources, fall last year -- before taxes, that is? I'll read the groups. N = 257

   a[9] Up to $8,000
   b[20] $8,000 to $14,000
   c[26] $14,000 to $20,000
   d[19] $20,000 to $26,000
   e[23] Above $26,000
   [7] Declined to state/don't know

That's all the questions. Thank you very much for your help.

INTERVIEWER TO FILL OUT REMAINDER:

8. Sex of patron N = 312

   [27] Male [73] Female

9. Mode of inquiry N = 312

   [93] Telephone [7] Visit

10. Topic of question (check all that apply) N = 267

    [7] Money matters
    [5] Consumer issues
    [2] Housing/hshld. maint.
    [4] Health
    [16] Job-related issues
    [2] Transportation
    [10] Education
    [5] Neighborhood issues
    [12] Recreation, sports
    [7] Family relations
    [1] Crime & safety
    [4] Legal matters
    [1] Child care
    [33] Other

11. Disposition of question (All that apply) N = 312

    [71] Information was given
    [17] Information was given after interview to probe underlying need
    [1] Librarian contacted a resource on patron's behalf
    [3] Other (Specify)

12. Was question answered (or referral made) from a resource file created by the library?

    [6] Yes [1] No

Exhibit VI-D. Survey results, Dallas.

Day of the Week:

Sun	1	Thurs	20
Mon	19	Fri	11
Tues	21	Sat	4
Wed	24		

Typology of Education and Income:

Low educ, low income	3
Low educ, hi income	3
Hi educ, low income	28
Hi educ, hi income	66

Exhibit VI-D. Survey results, Dallas (cont.)

women, more family relation queries.

. Clients who visit the library in person -- as opposed to telephoning -- are slightly more likely to receive complex information-giving in response to their queries.

J. STAFF ASSESSMENT

Considering the data of use, the impact of APL/CAT on the service program of the Dallas Public Library is "insignificant." Considering the opinion of many staff, I&R is not generally being provided -- "some staff do and some staff don't," according to personal inclinations. It is also believed that a certain amount of simple information-giving related to outside resources is widely provided, but that probing to identify the client's underlying need, helping the client devise strategies for receiving a needed service, working with the client to identify the best resource(s) for his/her need, and actual referral fall outside the professional requirements of the job. They are optional. The prevailing opinion however is that APL/CAT has had a beneficial effect on service in general at DPL, in that it has provided a unique tool for standard reference service and has opened the staff's eyes to a wide range of alternative responses to clients' queries. The staff also generally believe that APL/CAT represents a largely unrealized potential, that its full impact lies in the future in the implementation of a full service.

There is slight inclination that some staff may be hostile to the idea of I&R, and see reference, not I&R, as their rightful responsibility. The dominant attitude toward the idea of I&R was positive, as far as we could ascertain from the interviewees' remarks about their own feelings and their assessments of their professional colleagues' feelings.

The upper levels of administration have supported the idea of APL/CAT since the beginning. Yet it is clear that it is not among the top priorities for DPL growth. They view APL/CAT as a tool that the library supplies for the community and for its reference staff and not as a major direct service program of the library. There is unmistakeable ambivalence on the part of the top managers about the idea of "I&R." In the collective view from the top, I&R seems to be regarded as somewhere between a reasonable thing and an inappropriate thing for DPL to be doing. This view is reflected throughout the lower ranks.

The future holds many options for APL/CAT and the I&R venture at DPL. In a maintenance mode, there is a strong felt need for orientation to APL/CAT and I&R for all of the staff, and training in the use of the file for those who are expected to use it. (This orientation and training were about to begin as we left Dallas.) There was voiced a need for a statement of DPL's position on I&R; some staff are confused as to what is expected of them. Also, several people indicated the need for an on-line file accessible to all of the service staff, if possible. Finally, there were several references to the need for improvements in the subject access to resource entries and improved currency of the entries.

All of these changes are feasible, with the possible exception of providing multiple remote terminals for the service staff. It would not be surprising if some of the changes were to be accomplished. At the moment, there seem to be no concrete plans for grander changes. Preoccupation with the new central building and the monumental changes which it will necessitate has likely diverted attention from this relatively minor activity. Until the new building is occupied, we would not expect to see major changes in APL/CAT or the DPL approach to I&R; and, if sentiments remain essentially what they appeared to be at the termination of this study, we would not expect substantial change in the Dallas approach thereafter.

ENDNOTES

1. North Central Texas Council of Governments, Current Population Estimates, 1976. Arlington, Texas: North Central Texas Council of Governments, no date.

2. U.S., Environmental Protection Agency, Washington Environmental Research Center, Quality of Life Indicators in U.S. Metropolitan Areas, 1970: A Comprehensive Assessment, by Ben-Chieh Liu. Washington, DC: U.S. Environmental Protection Agency, 1975, p. 94.

3. Long-Range Plan for Public Library Services: A Self-Study. Dallas: Municipal Library Department, City of Dallas, 1977.

4. "Staff Committee Report: The Public Library as a Community Information Center." Dallas: Dallas Public Library, 1972. (Typescript).

5. "The Community Information Source." A brochure published jointly by the Dallas Public Library and the North Central Texas Council of Governments. No date.

CHAPTER VII

AMHERST

A. THE SITE[1]

THE AMHERST REGION

Hampshire and Franklin Counties, Massachusetts, together constitute nearly 1,300 square miles and have a combined population of about 153,000. While the ambience of Hampshire County is not stereotypically "rural" (there are four well-known colleges and a major university located in it), the major characteristic of both counties is contrast. In Hampshire County there are twenty-one towns, which range in population from 300 or so in Middlefield to Amherst, with 22,000 to 25,000 permanent residents to the city of Northampton's 30,000. Franklin County has the third lowest population density in Massachusetts; its largest town has about 15,000 people.

The population of the Town of Amherst is well educated (only 17% of adults over 25 lack a high school diploma), and the whole community is heavily oriented toward the five academic institutions in the region. These are the University of Massachusetts, Amherst College, and Hampshire College, all in Amherst, Smith College in Northampton, and Mt. Holyoke College in South Hadley. The 1970 Federal Census, which counted students who claimed Amherst as their principal residence, listed the town population as 26,331. The 1975 State Census, which is the basis for State Aid, excluded students and listed the population as 22,267. Both figures are widely regarded as underestimates. Amherst's single largest employer is the University of Massachusetts, which has approximately 20,000 graduate and undergraduate students.

Amherst's self-image is probably "progressive": it traditionally supports liberal state and national political candidates, it was strongly opposed to the war in Vietnam, and today majority opinion seems to be against nuclear power. But there is an active and vocal taxpayer's association which supports tax cap legislation, and rent control has been defeated several times. Probably the most accurate political description of Amherst would be "active": it is a community which thoroughly enjoys a good argument on almost anything.

THE LIBRARY

The Jones Library, Inc., the Town Library of Amherst, is a dual corporate entity: it is a private, nonprofit, tax-exempt corporation with an endowment and other assets, and it is the Library Services Department of the Town of Amherst. It is governed by six publicly-elected Trustees who serve both the Corporation and the Town Library. The Town itself is governed by a Board of five Selectmen who appoint a professional Town Manager, and a representative Town Meeting elected by precincts, which normally meets at least twice annually.

The Library budget, which in FY 1980 amounted to about $306,000, includes both endowment income (about 30%), Town of Amherst tax support, and a small payment under the Massachusetts State Aid to Free Public Libraries program. The Library participates in the Western Regional Public Library System, a loose cooperative, and grants free borrower cards to any resident of Massachusetss. The Library has two small branches.

The Jones Library (as well as Amherst itself) serves as an unofficial regional center for the smaller communities which surround it. Yet Amherst is not compensated -- nor can it be, legally -- for the library or other services it provides to the surrounding population. This fact helps explain why the Library's information and referral project, which serves a county-wide constituency, has never been fully integrated into the Jones Library/Town of Amherst organizational structure.

B. ORIGINS

In 1972 the adult services librarian organized a women's group to put together a directory of services for women available to Amherst residents. As it turned out, there was a high demand for the directory. At that time four of the six full-time professionals were new to the Library and probably brough with them an orientation toward outreach services and I&R. The adult services librarian, one of the four, was certainly inclined toward I&R and an expanded directory, and she served as a focus for the I&R impetus that was gathering. Part of the inspiration for I&R work was also probably drawn from the fact that Amherst had doubled in size in the '60s and had experienced the concomitant proliferation of services and apparent alienation among some of the populace that larger conurbations often experienced. Moreover, the Library was then seeking a way of becoming more vital to its citizenry; and there appeared to be sufficient money available to the Jones Library to permit the establishment of a new service without displacing existing ones.

In early 1975, upon receipt of the first funds from the LSCA grant, the building of the resource file began. The preparation of the Women's Guide paved the way, of course; but the DIS file-building effort was fundamentally the Library's. In July 1975, on the day two new phone lines were installed and six months after the beginning file-building, the I&R service opened for business.

Need Help?
call
Direct Information Service
DIS can help you find the help you need--
HEALTH CARE • COUNSELING • CHILD CARE • CONSUMER COMPLAINTS • LEGAL AID • ALCOHOL PROBLEMS • ELDER SERVICES AND MORE!
MON-FRI 9-5 256-0121
OPEN THURSDAY 9 AM - 9 PM
TOLL FREE 1-800-282-7779

C. I&R SERVICE CONCEPT

I&R at the Jones Library is called "Direct Information Service" (DIS).

From the outset, DIS has been intended to serve all kinds of people in the two-county area. This approach prevails in practice, even while the staff watch with care the local I&R activities that focus on special groups, such as senior citizens and children. State funding for I&R for these two target groups is given to local Amherst organizations; the library supports those organizations' I&R activities, trying not to duplicate and at the same time being certain that those client groups are adequately served. Necessarily, since many of the human services that are listed in the DIS file are oriented toward people in need (poor, elderly, handicapped, or otherwise disadvantaged), there is a certain de facto emphasis on such parts of the population. Even with this kind of emphasis, there is some feeling by the staff that one or more subgroups may be inadequately served (for example, the Hispanic people). The original objectives of the I&R activity were to:

- provide telephone I&R related to human services available to residents of Hampshire and Franklin counties, using a computer-based inventory
- assist human service providers by analyzing intake information in order to identify human service gaps
- help local libraries in the two counties to become local I&R centers

Simple information-giving, complex information-giving and referral are all provided as standard services by DIS. However, the predominance of activity is the two types of information-giving. Referral accounts for a very small percentage of DIS activity -- less than 2% of all DIS queries during the period of our study.

A major activity of the DIS staff is the maintenance of a resource file. Making this file available to the public, directly, is considered to be a major public service. Although few clients approach the office to use the DIS working files, it can be assumed that the published resource directory, All the Help You Can Get, provides direct access to the resource file for substantial numbers of the client group -- both professionals and lay citizens. It must be understood, however, that All the Help You Can Get does not list all the resources in the DIS working file, and that it is out of date to some extent even as it goes to press. [2]

An important part of DIS's service package is the production of resource guides on specific topics or related to specific target groups -- for example, child care, therapists, physicians, dentists, summer camps, toll-free numbers and services for seniors. These guides are developed in response to a substantial number of inquiries by the public or, in the case of the guide for seniors, under a contract with a state agency. These specialized guides, too, can be seen as providing direct access to a resource file. They are updated more frequently that All the Help You Can Get.

Follow-up consists of inviting the client to call back if he/she does not receive satisfaction at the hands of a referred-to agency; such invitations are proferred probably less than 20% of the time, and actual follow-up may occur less than 5% of the time.

Advice about strategy or developing a course of problem-solving action and advice about particular agencies seem not to be regular service activities, but may be provided by some staff some of the time.

Advocacy is not part of the regular service pattern in DIS, even though certain staff undertake a mild sort of advocacy occasionally. Feedback, on the other hand, is a formal, regular service of DIS that has been programmed into their activities from the very outset. Data collected in the course of providing I&R are used in reporting community needs to the Hampshire County Commissioners and the Human Service Coordinator of Hampshire County. Counselling is rarely done, and then only by certain staff. Transportation and escort services are not provided. In response to the critical nature of energy supplies in the north, Hampshire County provides an emergency fuel hotline for the County, called "Heatline." DIS's WATS line is the number to which people are referred, thus making DIS the initial contact and filter for Heatline. Heatline service grew out of requests to the Library by a variety of service agencies, and it corroborates to some extent the staff's claim that DIS is seen by other agencies as the "hub of the human services system" for Hampshire County.

In a formal sense, most of these services are new since the institution of DIS. Nonetheless, certain passive information-giving activity along the lines of DIS did happem prior to DIS's introduction: there was a rolodex file of selected resources kept at the reference desk that clients could use on their own.

In addition to providing I&R services directly to the client group, DIS staff support other organizations in their I&R activities. When requested, they train community librarians in the two counties to serve as local I&R workers. They also provide a variety of support services for non-library agencies including: distributing the published directory, helping set up their own resource files and collecting data for it, conducting training sessions on community information for such agencies as CETA and the State Department of Mental Health, convening meetings of I&R workers in the region, working with other agencies to seek funding for I&R and helping establish the Massachusetts Association for Information and Referral Services.

ACCESS TO I&R SERVICE

DIS service is available to the clients in both counties in five modes:

- Phoning the DIS operations staff at the Jones Library
- Walking into the DIS office at the Jones Library. The DIS support and service activities are housed in their own rooms in a part of the library's basement quite apart from other services.

- Using the published directory of human services (All the Help You Can Get, Jones Library, 1980). This directory is available to agencies and the public for $10.00
- Writing directly to DIS
- Directly contacting a resource that has on hand a copy of All the Help You Can Get. The DIS makes available to any person or organization a part or all of its file, on request, in the form of photo-copied "facility sheets." The requesting person or organization pays for copying.

The DIS has three phone lines -- two local and one incoming WATS (toll-free). These are independent of the library's own phone lines. Clients and staff can make use of three-way phone hook-up, which enables DIS staff, a client and agency staff to conduct a three-way conversation utilizing the WATS line without arranging it through a telephone operator. (This facility seems to be used less than 1% of the time.) Clients outside the local Amherst calling area can make use of the toll-free number and the incoming WATS capacity of DIS.

While community librarians in the two-county area may have been trained by DIS staff to serve as I&R centers, the only "resource files" to which those librarians have access are All the Help You Can Get and whatever files may have been constructed locally.

DIS offices are open Monday through Friday from 9 to 5, and on Thursdays until 9 p.m. When the DIS offices are closed, the regular library reference staff will attempt to provide answers to I&R queries. In this effort they use published I&R directories since they do not have easy access to DIS's working files.

D. I&R RESOURCE FILE

DEVELOPMENT

The development of the DIS resource file began with the initial grant, in 1975. The staff involved consisted of a half-time human services specialist, a full-time professional librarian with computer expertise who was hired for the project as community information coordinator, 10% of a professional librarian's time and about 40 hours per week of college student assistance. Some local agencies, such as the Council of Social Agencies and the Amherst Board of Health, helped in building the file by sharing their own files. As well, the Board of Health lent one of their CETA staff to help in file development; and the staff of the Amherst Community Resource Center (a mental health facility then housed in the library) assisted also. With this level of support, the initial file building took about 6 months. There were approximately 75 entries in the file on opening day.

FORMAT

Originally it was intended that the resource file would be computer-based and accessible on-line by DIS staff. Because of funding exigencies, the on-line dream was never realized. However, the format of the file was designed for computer. A system of batch processing was arranged at the University of Massachusetts Computing Center, using consultant-designed programs. The computer language COBOL was used to establish programs for information storage and retrieval and for indexing the resource file. SPSS and Fortran were used to develop programs for providing detailed analyses of client queries. For these analyses, clients' service needs were recorded according to the taxonomy of the United Way of America Services Identification System (UWASIS).

The statistical programs were flexible and could provide analysis beyond the level currently required by the project. However, the COBOL programs were not flexible enough to tolerate the frequent changes in the file. After two years of computer-based operation, the resource file became a manual entity. The statistical programs (in SPSS and Fortran) have been retained.

The resource file is in reality three interlocking files:

- A "facility sheet" on each resource, containing the library's standard description of that resource. The typed sheets are maintained in a loose-leaf binder and are organized by broad service headings such as "health" and "coping." See Exhibit VII-A for a sample facility sheet.
- A back-up file which contains pamphlets, annual reports, publications and ephemera on each resource
- "Subject" files. These are separate specialized files of educational information on such topics as housing subsidies, rooming houses and throat cultures; and lists of generic service providers such as Salvation Army service units, nursing homes and boards of health.

DIRECT INFORMATION SERVICE
~ Data Base Inventory

Record #: 3380 Date: 1/80 Page #: D-151B

HAMPSHIRE COUNCIL FOR CHILDREN

Vernon St. School
Vernon Street
Northampton, MA 01060
584-7972
AKA: Office for Children

Overview: This child advocacy organization is comprised of volunteers concerned about children's issues; the citizen elected Board of Directors prioritizes three to five issues for which the board and council membership advocate. Staff is available for technical assistance and training.

Office Hours/Days: Monday-Friday 9-5

Seasons Closed: none

Administering Agency: Office for Children

Administrator: Tracey Noble, Community Representative

Special Contact Info: Board President

Location Description: West on Elm Street last left before Northampton High School. They are located on the second floor of an old brick grammar school.

Staff: community representative and part-time secretary

Fees: none

Eligibility: not applicable

Transportation: Near PVTA Northampton/Williamsburg; agency provided for meeting attendence

Access for Handicapped: Can be arranged.

Languages Spoken: English only

Area Served: Hampshire County

Procedures for Obtaining Services: Call.

Services:

1. Community Education: Volunteers develop and facilitate community awareness campaigns around various children's issues.

2. Needs Assessment: Volunteers determine availability and gaps in local children's services.

3. Program Development: Based on identified needs, volunteers and staff initiate the development of needed programs.

4. Political Advocacy: Advocate and bring political pressure to bear on state bureaucracy and legislature around childrens issues.

Exhibit VII-A. Example of "Facility Sheet." Amherst.

Affiliations: Office for Children

Memberships: Mass. State-wide Advisory Council for Children

Licenses: none

Funding: Massachusetts state legislature through Office for Children.

Volunteers: Definitely; advocates, who do needs assessment, develop support research, lobby, information collecting, develop training.

These files are accessed by several indexes:

- a rolodex file of the names of resource organizations, in alphabetical order, containing brief information: name, address, phone, contact person, index terms, and -- most important -- file number of the resource (in order to provide access to the facility sheets which are in numerical order). The rolodex file contains cross-references.
- a subject index on 3x5 cards, containing resource names and file numbers. The subject headings were developed in-house after reviewing a number of indexing schemes and service taxonomies, including UWASIS. The index includes references to UWASIS code numbers on the 3x5 subject cards.
- various more specialized indexes: an index to resource persons listed in other files, including therapists, physicians and attorneys; location index; areas served index; eligibility index; and service modifiers.
- edge-notched card file on dentists, lawyers, doctors, therapists and churches offering emergency help. The descriptors are customized for each profession or group; each one is described (indexed) by the services offered, the main client groups served and geographic location. For an example of the index terms for a profession, see Exhibit VII-B.

RESOURCE FILE CONTENT

As it was originally conceived, the file was to include formally-organized services available to the citizens of the two counties. Soon after beginning service, it became apparent that many needs of the citizenry could be accommodated through individuals, informal groups and formal organizations whose helping services were not widely known. It was deemed essential to list such "alternative' resources in order to respond to the whole range of human needs. Therefore, in addition to formally recognized human service agencies and governmental agencies, the file has grown to include churches that provide secular emergency services; clubs and associations; non-profit organizations such as thrift shops and Salvation Army stores; for-profit organizations that provide rare or hard-to-find services such as second-hand clothing or chimney-sweeping; political organizations; helping groups such as Alcoholics Anonymous or autism discussion groups; and individual experts such as therapy specialists.

The resource file contains primarily resources available within the two-county region. Some state-wide and national resources are listed as well (The resource file does not comprise the only data base from which answers are provided, however).

The file currently contains 1600 resources, by actual count. When applicable, the follwing information is included about each resource in the main file, the "facility sheet."

- Name of resource
- Address and phone number of central and agency branches
- Description of service or activities

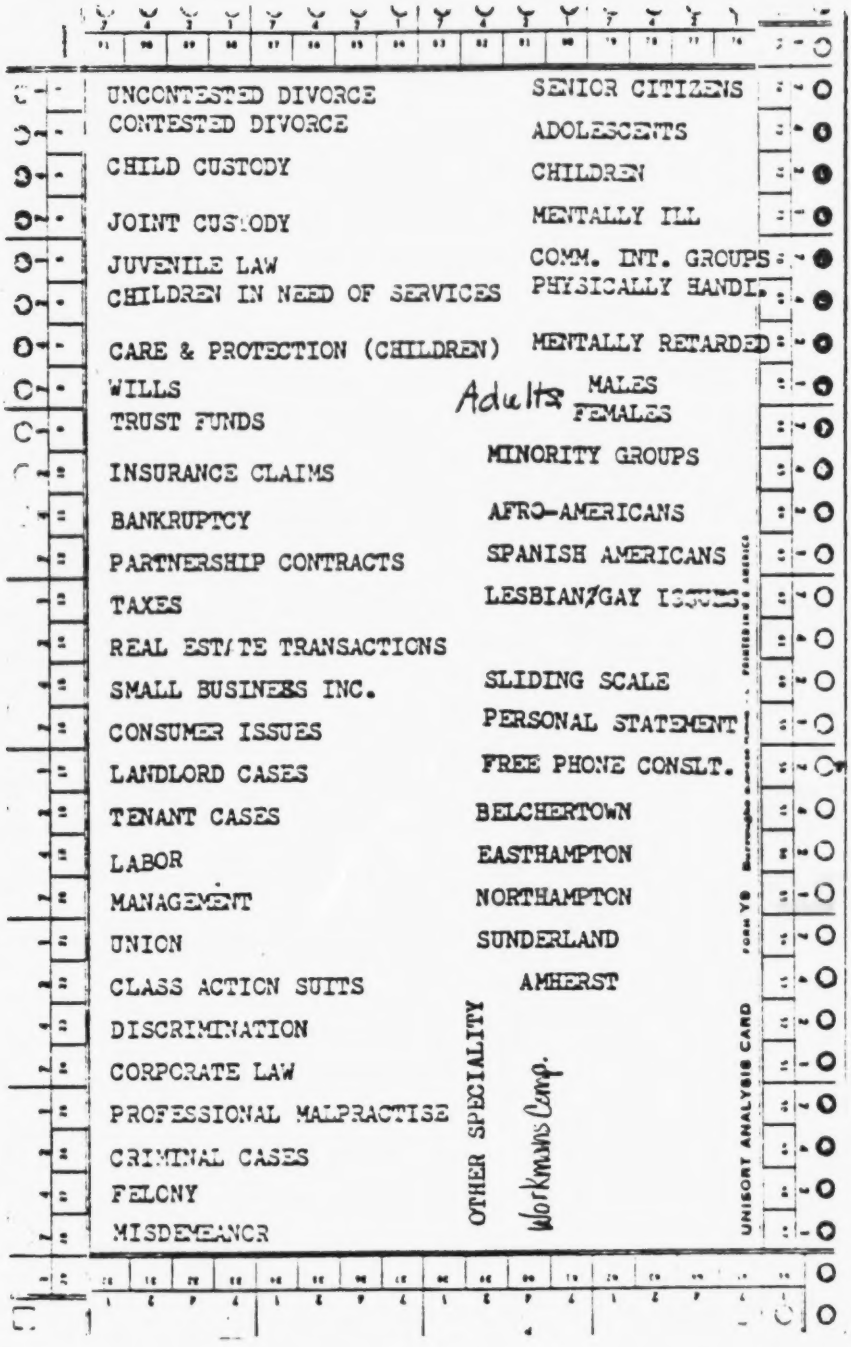


Exhibit VII-B. Description for Lawyers File, Amherst.

- Name and title of person to contact
- Name and title of person in charge
- Type of service (federal, state, local, private)
- Source of financial support
- Hours of service
- Geographic area served
- Eligibility requirements
- Qualifications of the staff
- Physical accessibility (ramps, parking, transportation)
- Service capacity/availability of services
- Meetings of or sponsored by the resource
- Goal or purpose
- Methods of obtaining service
- Speakers and publications available
- Subject headings and "see also" references

In addition, the back-up file often contains descriptions of the organization itself and its history.

MAINTENANCE

The same DIS staff who provide direct and indirect I&R service also do all the support work for I&R. Part of the work is the job of updating and enlarging the file. As explained above, the file has been enlarged from a list of formal service agencies to a list of many kinds of resources that are needed to respond to human needs. At the moment, there is no plan for major expansion of the file.

Updating existing resource entries is done on a regular basis about once a year for the average entry. Entries that are used more frequently are updated about four times a year. Such updatings are done systematically. That is, DIS staff contacts the resource by phone and verifies and corrects the information on the existing "facility sheet." Updating also occurs ad hoc. In the process of contacting resources in order to provide I&R service, it comes to the attention of DIS staff that various data elements -- phone numbers, officers, services, etc. -- are no longer correct, and correction of the entry occurs on the spot.

RESIDUAL USE OF THE I&R FILE

In some libraries the resource file is used for purposes other than I&R per se. In the case of Amherst, the DIS staff and library staff have used the file

- as an aid in training other I&R workers
- for job hunting
- to help students doing research projects identify resources
- as a source of agencies that can supply films

In all of these cases, it could be argued that the file was indeed used for I&R purposes. Nonetheless, these uses are not the ones for which the file was designed; the file entries do not contain explicit information on the availability of jobs, information for student research projects, or information about films.

ASSESSMENT OF THE FILE

The people working with the file consider it to be generally very good in terms of its arrangement, subject scope, currency and the depth of information available on resource entry. Indexing and format of the file are seen to be problem areas. The original programming for the computer provided excellent access to the various specific services provided by the resources. However, when the use of programs for information storage and retrieval were discontinued, it became difficult to maintain the indexing system manually. The multiplicity of indexes that are used to access the resource file makes changes in the files and indexes cumbersome, requiring simultaneous changes in several indexes with several subject heading schemes. Moreover, the looseleaf format of the "facility sheets" is seen as "clumsy", with pages falling out and getting lost more frequently than should be the case.

F. EXTERNAL RELATIONS

THE PUBLIC

During the period of the initial grant, February - December 1975, under LSCA Title III, "Interlibrary Cooperation," there was an advisory committee of citizens, to meet conditions of that LSCA Title. The second grant was awarded under Title I, "Services to the Disadvantaged," etc. Since an advisory group was not required, it was discontinued, and at the moment there is no formal mechanism for communicating with the lay citizenry. At the administrative level of Jones Library it is felt that the existing public process of securing funding provides sufficient communication with citizens. At the level of DIS operations, however, there is some sentiment for reinstating an advisory group in order to improve input to DIS and to enhance publicity of the service. Also, United Way of America is exerting some pressure on DIS to reinstate an advisory group.

OTHER AGENCIES

There is a fairly strong, though informal, network of I&R services in western Massachusetts. This provides an important link for DIS, since it opens access to knowledge about resources outside the target area; and inasmuch as DIS receives calls from distant places because of its toll-free number, knowing about distant resources is critical to serving those callers.

DIS and Jones Library staff feel that DIS provides a unique service to the region, and is known and valued for this by some of the human service agencies. While there are other I&R services available, DIS is the only one that is generic -- that is, relatively unlimited in topic scope or target group. To this extent, there is little if any conflict with existing I&R services.

G. ADMINISTRATION

ORGANIZATION STRUCTURE

Because DIS is operated expressly to serve the residents of Hampshire and Franklin Counties, and because the Jones Library officially serves only the residents of Amherst, it was necessary to establish DIS as an independent special project of the Jones Library, with distinct funding sources and budget. The organization chart below (Exhibit VII-C) illustrates the relationship between the regular Jones Library operations (severely abbreviated in the figure) and DIS.

The person who directly oversees DIS is the Community Information Coordinator. She answers direcly to the Director of the Jones Library, as do the other professionals in the system. The Library has two small branches, and while the published DIS directories are available there, the branches are not considered I&R outlets; nor, in fact, has there been demand at the branches for I&R service. The I&R staff have introduced some library staff in the two counties to I&R service and the use of published I&R directories; yet these small libraries are not considered bona fide I&R outlets -- primarily because the volume of I&R demand is very low and the full DIS working file is not available at those sites.

While the I&R service is used both by the public directly and by service agents on behalf of the public, the impression of many of the staff is that the public's view of the library has not changed in a substantial way since the institution of I&R service. If this is the case, it may be attributable to two things: First, the gross volume of I&R queries handled is relatively insignificant when compared with the volume of books circulated or reference queries answered at the Jones Library. That is, it may be that DIS is not touching enough of the public directly in order to change the general image of the Library from a materials-dispensing place to a question-answering place.

Second, and perhaps most important, the fact that DIS is physically and organizationally distinct from other parts of the Jones Library may permit citizens and resource agents to view it as an independent or quasi-independent activity. It is conceivable that the public accept the presence of an innovative adjunct to the major organization (the Library) without seeing any fundamental change in the major organization itself. In fact, this impression of the public's view of the Library and DIS -- gathered from the staff's expressions and corroborated by the study team's observations -- suggests the nature of change that I&R has brought to the Jones Library: An innovative service has been appended to the Library proper, with little impact on the services or the view generally held by the staff of the Library proper.

STAFFING

Among them, the DIS staff provide direct I&R service and support services to external agencies (training and distribution of the resources file), and they produce and maintain the working files, publicize DIS and handle ordinary administrative duties. The DIS staff consists of a full-time Community Information Coordinator, with a college degree in folklore and two years of experience

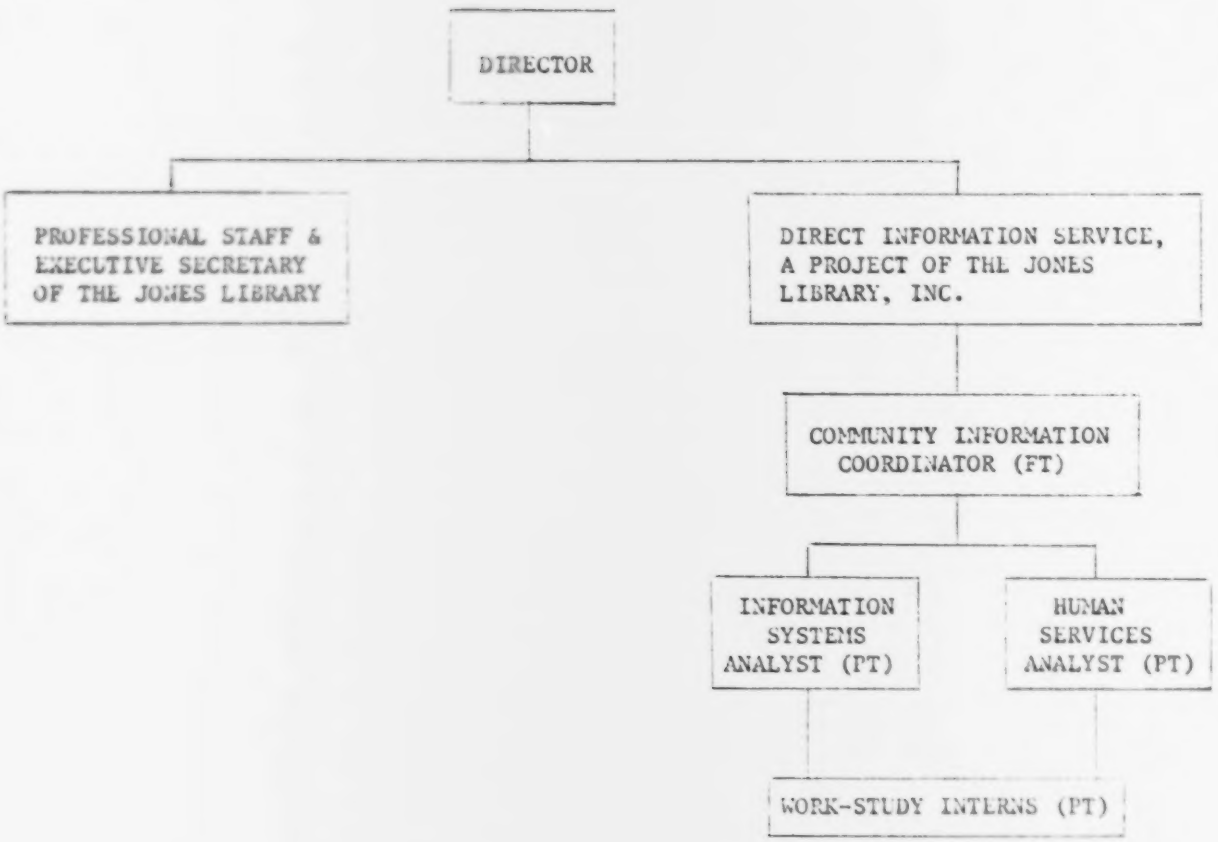

DIRECTOR
PROFESSIONAL STAFF & EXECUTIVE SECRETARY OF THE JONES LIBRARY
DIRECT INFORMATION SERVICE, A PROJECT OF THE JONES LIBRARY, INC.
COMMUNITY INFORMATION COORDINATOR (FT)
INFORMATION SYSTEMS ANALYST (PT)
HUMAN SERVICES ANALYST (PT)
WORK-STUDY INTERNS (PT)

Exhibit VII-C. Organization Chart of the Direct Information Service, Amherst.

in I&R; two part-time associates with bachelor's degrees in art and mathematics; three part-time work-study students from nearby colleges; one or two part-time volunteers; and one full-time CETA employee. Below the library director, the adult services librarian, who works for a few hours a week on the resource file, is the only formally trained librarian on the DIS staff. In addition to the Coordinator, one associate has had some exposure to human service work before coming to DIS.

Staff for DIS have been hired with attention to the specific skills required at the moment by the department. Originally there was a need for expertise in information systems, and at that time a professionally trained librarian was hired. Recently, however, the skills required related predominantly to interpersonal skills, communication, management and search skills. All new staff are required to exhibit skill in organizing; ability to communicate orally, in writing and by telephone; knowledge of the community; knowledge of local services; and a capacity for creative thinking. In addition, each staff position has specialized requirements such as expertise in data processing, supervision, training and publication.

The DIS staff have made presentations to the general library reference staff, at which the concepts and operations of DIS and the local human service system were presented. They have also introduced some staff to I&R so that the library staff would be able to provide at least modest I&R service during hours when DIS is closed.

The training of new DIS staff involves spending several hours in introduction to the files, the DIS service concepts and the library/DIS configuration. Following that, the staff member begins actual work and on-the-job training. All staff are housed in a relatively small space; and this fact provides considerable sharing and informal "supervision" as new employees try their hands at either direct I&R service or the various back-up activities.

COSTS

Start-Up Costs

The major preparation for DIS occurred between February and June 1975. The total costs for start-up activities during this period was $7,447. Of this, $4,226 from Library Services and Construction Act Title III funds was spent on personnel, travel, supplies and telephone -- all acquired specifically for the new project; and in-kind expenses amounting to $3,221 were incurred by the Jones Library itself for project supervision and administrative overhead (space and utilities). To round out the picture of start-up costs, it is necessary to add the costs of computer programming -- $4,100 -- even though that did not occur until late 1975 and early 1976. This brings start-up costs to $11,547. In evaluating this "total" it must be remembered that file development for I&R in Amherst, as in most other sites, began from a pre-existing base. In this case it was primarily the Women Resource Guide, the library's existing files, and the files and experience of the library-housed Amherst Community Resource Center. As well, donations of the time of a CETA person from the Board of Health and staff of the Amherst Community Resource Center were resources used in start-up.

Therefore the "total" of $11,347 is a misleadingly low estimate of the actual cost of preparing for I&R service.

On-going Costs

From July 1979 - June 1980 (fiscal year 1980) the DIS was supported by revenues from the following sources:

Hampshire County Commissioners	$20,000
Hampshire Community United Way	2,200
Sales of directories (projected)	5,000
SUB -TOTAL	$27,200
In-kind support(approximate)	11,000
TOTAL	$38,200

The projected expenditures of Total Revenues in FY 1980 (not including in-kind support from the Jones Library) breaks out in the following way:

Personnel (Regular)	$23,600
Work study personnel	2,900
Taxes (FICA)	1,400
Benefits (health)	900
Telephone	3,000
Travel	100
Supplies	500
Printing	600
Computing	700
TOTAL	$33,700

Clearly, a deficit of approximately $6,500 was anticipated for the fiscal year. Much of it would be offset by changes in personnel that would reduce temporarily the personnel costs.

PUBLICITY

Publicity for DIS has always stood alone. No other library services have been included in DIS publicity, and vice versa. Initially, DIS was publicized through signs and pamphlets distributed distributed through libraries in the target area, through newspaper features and paid advertisements, and through posters displayed throughout the target area. The approximate cost of initial publicity was $150.

After service was actually begun, additional strategies of publicizing DIS were employed: posters -- printed at a cost of about $200 -- in public buses and in other places in the target area; DIS was listed in the telephone book; and radio spots were initiated.

Additionally, DIS has been publicized through the Library's annual reports, speeches by Library's staff to community groups, National Library Week events, and brochures describing the Library's services.

One of the most effective means of publicity is the telephone book and, concomitantly, the local telephone operators, who frequently give the DIS numbers to callers who do not know where to turn. The other most effective publicity channels appear to be radio spots, display ads and feature stories in newspapers. Sustained radio and newspaper publicity seem to assure a reasonably high level of intake. Moreover, the solid working relationship between the Library and the Hampshire County Human Services Department, the Welcome Wagon and certain state agencies has led to additional promoting of DIS services.

H. I&R IN THE CONTEXT OF OTHER LIBRARY SERVICES

As might be expected, the DIS staff are enthusiastic about DIS. Even those with non-library background tend to see the library as an appropriate organization to be offering a generic I&R service. The Jones Library staff, too, are generally supportive of DIS activities; many of the staff would favor eliminating a traditional library service -- such as program events or interlibrary loan -- in lieu of eliminating I&R, primarily because such activities are seen to be either oriented toward an elite clientele, to be used less by the citizenry or to have a lower social value. It appears that the newer staff of the Jones Library are more supportive of I&R than are some staff who have been there longer.

The administration of the Library seems to hold I&R generally and DIS specifically in high regard. While it is not the highest priority among the Library's service activities, it is viewed as an important service that should be given the wherewithall to continue. It may be a testimony to the administration's support for DIS that the search for additional money, year after year, has consumed considerable staff resources in proposal-writing and funding hearings. At the same time, there is no indication that DIS -- or another form of I&R service -- has displaced or will displace any of the established library services. This may be due in large measure to the fact that DIS serves a two-county region, whereas the Jones Library serves, and is funded fully by, the town of Amherst; and therefore the option to displace a locally funded service with a regionally funded service may not exist.

DEGREE OF INTEGRATION

The DIS office, where all I&R work is carried out, is in the basement of the charming but crowded Jones Library, separated physically from the other working parts of the library by a rather complicated floor plan which effectively removes DIS from other library activities. DIS is also distinct professionally, in that none of the staff have formal library training. It is segregated politically to the extent that it is a regional service with regional funding that is very uncertain from year to year, whereas the library is funded locally at a rather constant dependable level.

There may also be some social distinction between DIS and the rest of the Library staff, as well. Given the demands of the I&R job -- often working with people of restricted means and communicating at length and in some depth with people in need -- the people attracted to DIS positions are inclined to be strongly oriented toward people at the lower end of the socio-economic spectrum and toward people with personal, as opposed to academic, problems. Several of the interviewees felt that such charcteristics may differentiate DIS from most other Library staff.

DIS, then, is a segregated activity within the Library. Although other parts of the organization are physically segregated as much as DIS, the additional segregation of DIS along the lines of staff backgrounds and service orientations, political and organizational relationships and funding emphasizes the separateness of DIS compared with other departments. This separateness, coupled with the magnitude of the I&R service innovation, could understandably lead to a situation of considerable resistence by the staff of the traditional departments of the Library.

however, despite these potential sources of conflict between DIS and other parts of the Library, there seems to have been no warfare over DIS. While limited staff resistance was reported, there seems to have been general acceptance of the new department as well as frequent instances of cooperation. This may be attributable to the director's reasonably strong support of DIS from the beginning, and the predisposition of the newest professional staff of the Library (non-DIS) toward outreach and I&R services. Yet there is a certain amount of dissatisfaction among staff as to the way the established library services relate to DIS. For example, among non-DIS staff, there is considerable sentiment at all levels for integrating I&R and reference activities. Said one, "DIS is a foster child in a loving home."

I. EVALUATION

DATA COLLECTED ON I&R

The DIS staff regularly collect statistics on I&R:

- Number of queries
- Topic of queries
- Mode of inquiry (walk-in, phone, letter)
- Sex of user
- Number of referrals
- Number of follow-ups
- Time spent on each query
- Agencies directing clients to DIS
- Agencies to which DIS directs clients

TRANSACTION SURVEY

Interviews with DIS clients were conducted from January through June 1980. Although it was the intention to interview every client until 400 interviews had been completed, it turned out that the interviewing was erratic. It cannot be assumed that the staff imposed no selection bias on the survey; therefore, these data will have to be taken as tentatively indicative of transactions over the first six months of 1980. Exhibit VII-D displays the survey instrument with the frequencies of responses to questions. A number of the frequencies are of interest:

- Of all the seven sites, Amherst claims the greates percentage of first-time I&R users. About 2/3 of the I&R users said they had never used the service before.
- Yet Amherst matched Baltimore County in the proportion of I&R users who had used other library services before: 86%.
- A remarkable 39% of the I&R users have been directed by another agency to the library's DIS, suggesting considerable rapport between the library and other agencies in the community.
- Consistent with the above finding, over half the I&R clients have asked their queries at other places before approaching the library.
- 64% of the clients come from families with a total income of $14,000 or less.
- About 3/4 of the clients are between the ages of 20 and 35.
- Health queries constitute 38% of the topics inquired about in DIS -- the largest single topic reported by any of the site libraries.
- The DIS files were used to answer 97% of the queries. Exhibit VII-E is a bar graph produced by the DIS staff presenting the relative proportions of topics inquired about during three fiscal years. Note that the taxonomy used here is not the same as was employed for the current study.

[1] Agency call (answer only questions 9-12) n = 338

__ No response (answer no questions)

PUBLIC LIBRARY INFORMATION AND REFERRAL PROJECT

Branch _____
Date _____
Time _____

We're trying to improve our service. Would you help us by answering a few questions? We won't record your name and it should take only one minute.

1. Have you used the library's information service before -- the one you're using now? n = 275

   [31] Yes [66] No [3] Don't know

2. Have you used any other service of this library system? n = 272

   [26] Yes [1] No [4] Don't know

   IF YES: n = 234

   [70] Was it within past 3 months?
   [15] Was it within past year?
   [4] Was it longer ago? (Or don't remember)

3. How did you learn of the library's information service? n = 272

   [4] Friend, neighbor, relative
   [6] Library staff
   [39] Referred by an agency
   [2] Radio
   [1] Television
   [12] Newspaper
   [31] Other

4. Have you asked your question in any other places before coming to the library? (You don't have to name them.) n = 263

   [53] Yes [47] No

5. I'll read some age groups. Just stop me when you hear yours. [Interviewer: Omit obviously wrong groups when possible.]

   n = 247

   a[4] 13-19
   b[17] 20-35
   c[4] 36-45
   d[4] 46-64
   e[2] 65 or over
   [2] Declined to state

6. I'll read some groups based on years of education completed. Just tell me when you hear yours.

   n = 272

   a[25] College graduate
   b[38] Some college
   c[4] High school graduate
   d[4] Some high school
   e[1] 8th grade or less
   [5] Declined to state

7. In which of these groups did your total family income, from all sources, fall last year -- before taxes, that is? I'll read the groups. n = 274

   a[31] Up to $8,000
   b[22] $8,000 to $14,000
   c[12] $14,000 to $20,000
   d[6] $20,000 to $26,000
   e[9] Above $26,000
   [10] Declined to state/don't know

That's all the questions. Thank you very much for your help.

INTERVIEWER TO FILL OUT REMAINDER:

8. Sex of patron n = 265

   [25] Male [75] Female

9. Mode of inquiry n = 319

   [21] Telephone [11] Visit

10. Topic of question (check all that apply) n = 342

    [12] Money matters
    [3] Consumer issues
    [1] Housing/hshld. maint.
    [32] Health
    [4] Job-related issues
    [2] Transportation
    [7] Education
    [5] Neighborhood issues
    [3] Recreation, sports
    [6] Family relations
    [1] Crime & safety
    [7] Legal matters
    [3] Child care
    [17] Other

11. Disposition of question (All that apply) n = 323

    [36] Information was given
    [17] Information was given after interview to probe underlying need
    [4] Librarian contacted a resource on patron's behalf
    [2] Other (Specify)

12. Was question answered (or referral made) from a resource file created by the library? n = 326

    [73] Yes [3] No

Exhibit VII-D. Survey results, Amherst.

Day of the Week: n=330

Sun	1	Thurs	26
Mon	30	Fri	17
Tues	18	Sat	1
Wed	8		

Typology of Education and Income: n=245

Low educ, low income	9
Low educ, hi income	1
Hi educ, low income	62
Hi educ, hi income	28

Exhibit VII-D. Survey results, Amherst (cont.).

GRAPH I PERCENTAGE OF TOTAL INQUIRIES FOR TEN MOST REQUESTED SERVICES

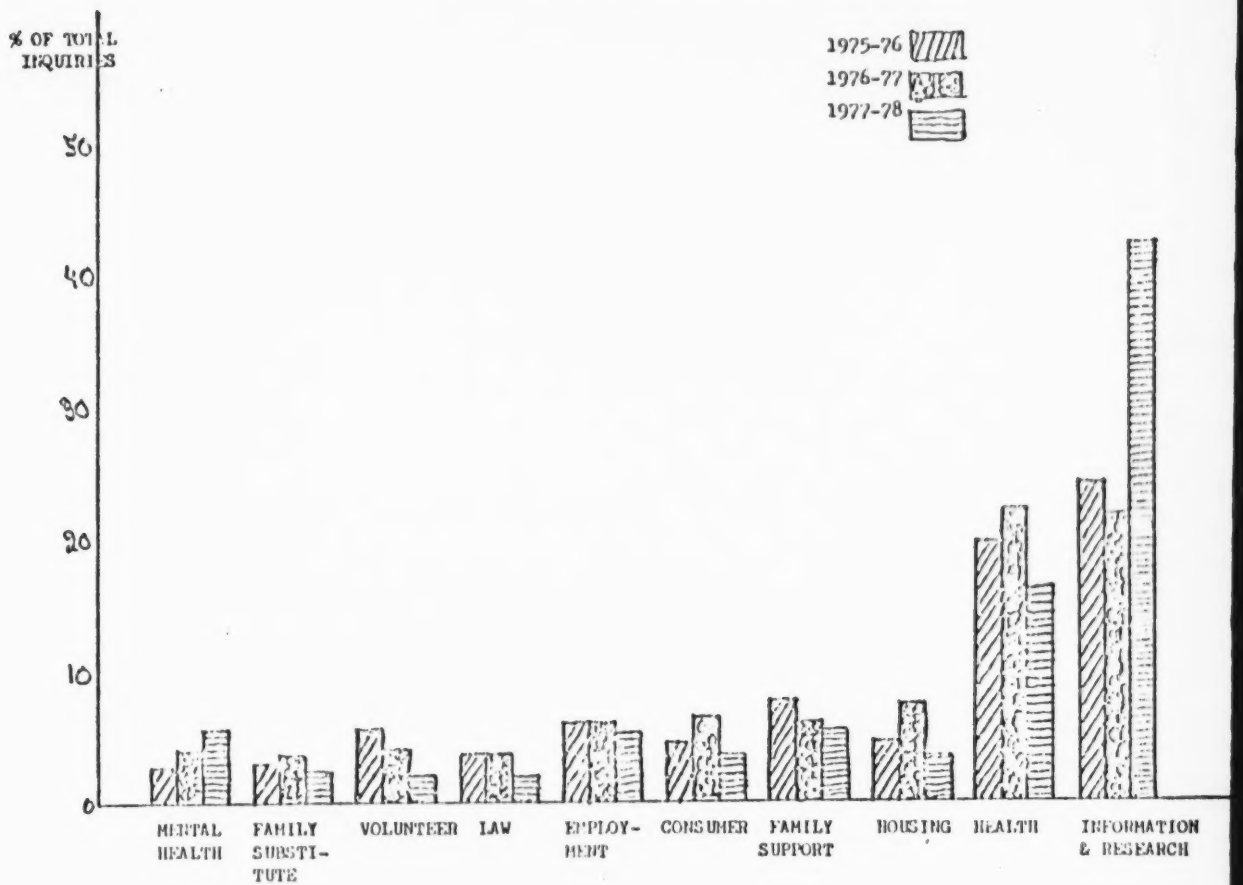


Exhibit VII-E. Queries by Topic. Amherst.

VII - 23

Many crosstabulations produced chi-square values significant at the .05 level or better. Several of these seems potentially useful in explaining relationships among the variables.

- There is a stronger than usual tendency for agency calls to relate to educational topics.
- New I&R users are inclined to call with regard to the topic of health.
- Men, more than women, tend to present consumer and legal queries.
- People asking housing and household maintenance queries tend to have learned of the service from friends, neighbors and relatives and not from agencies.
- Those asking about health-related topics tend to have learned of the service from agencies and not from friends, neighbors and relatives.
- Those asking job and law-related queries are less likely than other people to have learned of the I&R service from an agency.
- A person asking a health-related query is more likely than others to have asked his or her query somewhere else before coming to DIS.
- People who have used the I&R service before are more likely than others to fall into the upper two income brackets.
- People who have asked their queries at other places tend to have learned of the library's service through newspapers.
- Those who are older also are more likely than others to have learned of DIS through newspapers.
- People who have posed their queries elsewhere before coming to the library tend to elicit a "referral" response from the staff -- that is, calling an agency on the client's behalf.
- Older clients are more likely than younger ones to be responded to with "complex information-giving" -- that is, provision of information after probing to uncover the underlying need, and they are less likely to receive simple information-giving -- provision of information without such probing.

The composite typology of education and income, when crosstabulated with other variables, yielded one significant association:

- Those who could be considered frequent users of library services (last use within the past three months) tend to fall into the two high-education categories: high-education-low-income and high education-high income. This finding was corroborated in the simple association of education and use of library services: those with more education tend to be the most frequent users of library services.

REFERENCE ACTIVITY COMPARED WITH I&R

The ratio of DIS queries to Jones Library reference queries is about 3:13 (from the data collected by the staff prior to this study). When compared with circulation and reference, I&R cannot be seen as a major service of the library, in terms of sheer quantity. Perhaps because of the relatively low volume of I&R intake, the impression of some staff is that I&R has done little as yet to alter the general public image of the library and the services it offers. It seems to them that the public are still surprised to find that DIS is a library service. Similarly, while some human service agencies consider the library a legitimate place for I&R, some agency personnel continue to register surprise discovering that DIS is a library service. Nonetheless, 39% of DIS callers have been steered from other agencies and 19% of DIS intake are direct calls by agencies, according to data from the Transaction Survey

STAFF ASSESSMENT

In the Library's total service program I&R represents a qualitative, if not quantitative, innovation. The nature of the staff, the queries received, the service provided, and the organizational configuration of DIS are all quantitatively distinct from activities and resources of the Jones Library.

The overwhelming problem facing DIS, expressed by every person interviewed as the major problem, is the uncertainty of funding at an adequate level from year to year. DIS runs on what amounts to "soft" money. Its sources of revenue must be wooed continuously for relatively meager levels of support; and no one source of revenue accepts full responsibility for the continuation and success of DIS. Some of the funding problem is traceable directly to the fact that the Jones Library and DIS serve, and therefore are funded on, different jurisdictional bases. Part of the problem is also traced by staff to a lack of awareness among the public and local officials of the importance of I&R and DIS in particular. Staff suggestions for raising the level of awareness include improving the legitimacy of DIS by taking it outside the walls and off the organization chart of the Jones Library; reinstituting a DIS advisory committee to help with fund-raising and publicity. An alternative solution advanced for the funding problem would call for more stable funding under the budget of the Jones Library, whether those funds came from state, regional or local sources.

Very little in the way of internal or management problems were expressed by those interviewed, with one exception. The current segregation of DIS from other library functions is viewed by many staff on both sides as dysfunctional. It creates artificial boundaries between I&R and reference and seems to create some amount of tension between the two staffs. It also perpetuates the funding situation of DIS. Numerous staff expressed a strong desire to see the DIS and reference activities integrated in location and staffing. However, while the organization and staff of the Jones Library would be little displaced if DIS and reference were merged, the limitations of the current building and the intransigence of current political and funding configurations bode ill for a full merger in the near future.

To some staff, it seems that the impact of DIS on the political and budgetary processes of the Town of Amherst has been negligible. On the other hand, other staff feel that DIS has expanded the visibility of the Library in the eyes of the human service sector to a great extent; and the data of the Transaction Survey corroborate this assertion.

ENDNOTES

1. The material in this section is based largely on an unpublished article by Anne M. Turner, "Information and Referral, A Report from the Field," 1979.

2. It is estimated that as much as 15% of the resource file at the Community Resource Information Service of Philadelphia is superseded every month. Conversation with Thomas Deahl, Community Resources Information Service, Philadelphia, 3 April 1980.

CHAPTER VIII

BALTIMORE COUNTY

A. THE SITE

THE COUNTY

Baltimore County, the third largest county in Maryland, has an area of 610 square miles. It surrounds, but not includes, the city of Baltimore. The population of the County was 671,326 in 1974, with a density of 1,100; the 1980 projected population is 717,734 with a density of 1,170. The population is predominantly urban in character -- 89% is in urban areas with the heaviest concentration around the Baltimore Beltway and in the Southwest. Non-white population is 3% (1970) and is projected to be 5% in 1980. One-quarter of the total land mass, in the northern part of the County, is agricultural. [1]

Approximately 59% of the population is employed in white collar positions; 25% are in manufacturing; the balance is in manual occupations. Bethlehem Steel Corporation and the National Social Security Administration are the major employers. The median number of school years completed was 12.1 in 1970, compared to the U.S. median of 12.0 The educational level is lower than average for Maryland jurisdictions over 250,000 and about average for the state as a whole. The median family income is $12,000 (1970). Baltimore County has the highest median age in the state, about 29 years; 18% of its population is over the age 55.

THE LIBRARY

The suburban movement after World War II provided the major impetus for the consolidation of ten autonomous libraries into a system in 1949. The Baltimore County Public Library System now has 14 branches, four satellites, four mini-libraries, and one bookmobile for service to institutions. There is no main or central branch for the system, but administrative and centralized functions are located at the Towson Area Library.

Previous research indicates that the age, education, and income levels of the County would normally correlate with low or moderate levels of library use; but Baltimore County had the highest circulation per capita in the state in 1975 and highest in the nation in 1978 and 1979. [2] It is estimated that more than two-thirds of the households have at least one registered library cardholder. The high level of citizen use can be attributed to no single factor, but seems to be tied to the library's basic service philosophy: "to make readily available to the greatest number of County residents the most wanted materials of all kinds, and to serve as a point of access for any needed information." The library is committed to dispensing materials that citizens ask for and not materials that librarians think they should ask for.

In February of 1972 Baltimore County Public Library (BCPL) published the first issue of "HELP," a guide to selected resources available to residents. It listed such resources as drug centers, draft counselling, and recycling

sites and provided brief information on relevant statutes and how to access the various services. The guide, issued on newsprint in tabloid format, was distributed in a Sunday edition of The Baltimore Sun. "HELP" was the first formal system-wide effort by Baltimore County Public Library to "facilitate the link" between client and appropriate community resources.

B. ORIGINS OF I&R

In December 1973, the Baltimore Regional Planning Council and Westat, Inc. produced "Information Needs of Urban Residents." The report had a number of serious implications for libraries. Briefly, it said (1) that people in all walks of life have many unsatisfied information needs, (2) that there is a confusing multitude of information sources that people could turn to, (3) that the library is considered a source of information for an average of only 3% of all information needs, and (4) that it is fair to conclude that an omnibus steering and referral service is needed.[3] This report was a clear mandate to library and information professionals to review their activities and to improve access to information about the multitude of resources that exist in modern urban society. The staff and administration of BCPL were particularly aware of an information void in Baltimore County and a gap in the library's program of services. Shortly after preliminary issuance of the report, the BCPL Information Services Committee was formed, with the charge of reviewing and recommending changes in BCPL's information services. In the fall of 1973, the Committee began talking informally with Thomas Childers, from the Graduate School of Library and Information Science, Drexel University, about the feasibility of initiating an I&R service that would satisfy some of the needs identified in the Warner Report. The initial goal or function of such a service was to put the client in contact with government, civic, social and sometimes private agencies for the service, activity or information he or she needed.

The general plan for initiating an I&R service consisted of three phases: planning, development and training; demonstration; and implementation. In the summer of 1974, Thomas Childers, as consultant with Edward Elenausky, a BCPL staff member, and a clerical worker, established a central I&R clearinghouse. The major activities of the clearinghouse staff for the summer of 1974 were to:

- Develop procedures for collecting information about community services, activities and information sources
- Consider and make recommendations about the way in which the service should be organized within BCPL
- Prepare forms for collecting and recording information
- Develop file arrangement and indexes appropriate for access to the information
- Establish liaison with other information services in the community
- Plan publicity for the demonstration and implementation
- Introduce the community information service to the total BCPL staff
- Train professional and clerical staff in the branches in gathering information about community resources
- Recruit and train volunteer staff to assist in related activities

. Begin collecting information about community resources

Beyond the summer, the Clearinghouse continued to serve as the nerve center of the service, collecting information about community resources, organizing that information and distributing it to library branches, training staff system-wide, serving as a back-up to the branches in their efforts to answer clients' queries, and evaluating and reporting on the service. The service was named Community Information Desk (CID).

The staff of BCPL were introduced to the idea in June 1974, in Branching Out, the BCPL staff newsletter; the public, in Report to the Reader in December 1974. Major planning was ended in September 1974. A demonstration of the service was begun in the Catonsville branch in February 1975. The publicity announcements -- necessarily local -- specified that the service was available only in the single location. However, many of the public construed the announcements to apply to all branches in that area of the County. Management concluded that they could not reasonably launch an aggressive publicity campaign for an isolated area of the metropolitan region. Therefore in April 1975, the decision was made to initiate the service county-wide as soon as possible. I&R was thus implemented in all area branches in June 1975. About this time -- March 1975 -- acting on the advice of the advertising firm that was handling the I&R publicity, the I&R service was renamed "Accurate Information Desk (AID).

Technical aspects of providing service were developed during the demonstration step. Training of staff in collecting data and providing service took place from the summer of 1974 into the spring of 1975. During the summer and fall of 1974, when the service was being planned and the files were being built, 80% of the professional staff and selected clerical staff were exposed to two half-day orientation and training sessions. In the first session they were introduced to the need for and concept of I&R, and the plan for how it would operate in the library system. They were also introduced to their part in collecting information for the resource file -- namely, polling local resources and feeding that information to the Clearinghouse. In the second session, their problems with collecting information were discussed.

One month before the I&R demonstration began, a service workshop was held for the demonstration branch and nearby branches to prepare the professional staff for handling the kinds of questions that would be encountered. This workshop was held in conjunction with the Health and Welfare Council and included observation and practice question-answering at the Council's Information and Referral Service in downtown Baltimore.

Also in the summer of 1974, a formal but small volunteer program was started in order to augment the staff working on I&R. About six volunteers received training in data collection. During the same period the clearinghouse staff developed the following forms:

Data Collection Form, for phone and in-person interviewing
Data Collection Form, for mailing
Resource File Form
Transfer Sheet, for file corrections
Contact File Form, for candidate resources
Introductory Letter
Reference/Information Intake Form
Weekly Statistical Report Form

The Data Collection Form, of central importance to the service, required the most time to develop. Several interview forms, ranging from one page and very open-ended to 18 pages and very structured, were pretested before a decision was reached. The final form was based on the interview schedule developed at the Detroit Public Library and represented a manageable compromise between the other two forms. The following instructional aids were developed by the clearinghouse:

Data Collection Procedures
Data Collection Form: Instructions
Instructions for Completing the Resource File Card
Suggested Phone Contact Procedure

An index thesaurus was developed. This subject heading list was in "layman's language" and was based on the one prepared by Detroit Public Library. Since their first incarnation, the forms, instructional aids and the thesaurus have gone through several revisions.

In that first summer, all branches began collecting information about resources local to their respective sites and turned it over to the clearinghouse.

C. I&R SERVICE CONCEPT

The initial service concept for BCPL's I&R service was to put the client in contact with one or more resources appropriate for his or her need. The operating objective was that within three years, AID would be the place Baltimore Countians would think of first when they do not know where to turn for a needed service, activity, advice or information. This objective required collecting information about local, state or federal organizations or agencies that can help Baltimore County residents; updating that information through telephone and walk-in inquiry; helping the client interpret information about resources; and helping the client get in touch with a resource.

The service is decentralized. The primary outlets for I&R are the branches of the system (excluding the bookmobile). Clients of the system's "mini-branches" access I&R through a hotline directly to the Information Desks of their respective parent branches. A secondary outlet is the Clearinghouse. As described above, its main role is to support the branch delivery of I&R by collecting, arranging and disseminating information on resources and by training staff and publicizing I&R. A subsidiary but vital role is supporting branches in the actual delivery of I&R, by assisting on queries -- usually tougher or more exotic ones -- that branch staff refer to the Clearinghouse.

From the beginning, the information service was designed to serve the general population. Currently it seems not to be used by any particular sub-group of the population except possibly senior citizens.

Simple and complex information-giving are provided as a standard service in all BCPL branches. The amount of referral, advice on resources and strategy, follow-up and advocacy varies from staff member to staff member in the branches; in the Clearinghouse the staff seem to provide all of these as standard services, with follow-up occurring on about 1/3 of queries that the Clearinghouse receives. Feedback, counselling, transportation and escort are not provided by any branches or by the Clearinghouse.

Maintaining the resource file is the major activity of the clericals in the Clearinghouse. A copy of this file is available at the information desk in every branch, satellite branch and mini-libraries. The Baltimore County Division of Community Affairs and the Police Department's Division of Community Relations have copies of the file; and a copy of part of the file is sent to the Maryland Commission for the Humanities and the Baltimore County Commission on the Arts and Sciences. Libraries outside the BCPL System that hold a copy of the file are Enoch Pratt, Hartford County, Cecil County and Carroll County public libraries.

Staff claim that the I&R service at BCPL branches is predominantly "I" and very little "R". The resource file and I&R are seen as a tool and an

approach, respectively, that enhance the information-giving function of the library. They are not seen as a "new" service. I&R is viewed by staff -- and perhaps legitimately in BCPL -- as not significantly different from reference. Three of the characteristics of I&R that could distinguish it from reference are maintaining a resource file, referral and follow-up. While the first is a significant activity in BCPL, referral, judging from its frequency in the transaction survey (8% of the transactions), could not be considered substantial. And while the survey provides no data on follow-up, interviews suggest that very little systematic follow-up occurs -- probably in the range of 1-3% of the transactions. However, the percent of actual referrals is higher than at Memphis, where it is claimed that the service is a true "referral" service. If the averred differences in approach are real, something other than these data must be looked to for an explanation.

There is telephone and walk-in access to the I&R service. Three-way hook-ups were tried in the early days of AID, but have been abandoned as being little-used -- mostly because actual referral is rarely done at the branch level. The Clearinghouse is open from 8:30-5:30 weekdays. The branches vary in their opening hours, but some branches are open every day of the week, except Sunday in the summer, and every evening, except Friday, Saturday and Sunday. The Clearinghouse also aids the branches in providing additional information on inquiries that involve inside library resources or referral of subject requests to other libraries in Maryland. That is, the Clearinghouse supports the I&R function of the library as well as its non-I&R information-giving functions.

D. THE RESOURCE FILE

Collection of data for the resource file began in the summer of 1974 with the establishment of the Clearinghouse. One library professional, one consultant and one clerk worked full time that summer with some volunteer help. In addition to the staff specifically assigned to AID, professional staff throughout the system helped collect information about resources local to their respective branches. The branch staff were assisted in this work by volunteers who had been recruited especially for this purpose under a volunteer service program newly organized by the library. Two professionals and two clerks staffed the Clearinghouse beginning in the fall of 1974. Their main activity was continued collection of file information. Altogether three or four people worked six to eight months to develop a file containing 1,000 entries when the demonstration began in February 1975 in the Catonsville Branch. The file contained 1,500 entries when the service was implemented system-wide in June 1975. Currently there are 2,500 entries in the file.

The original format of the main file was 5x8 index cards arranged alphabetically by service provider. The file continues in this format with a few changes made to improve the readability of the entries and to make them more standard. Information on each resource is collected by means of a Data Collection Form (see Exhibit VIII - A) and includes the following:

- Name, address, phone number
- Description of services or activities
- Name and title of person to contact
- Name and title of person in charge
- Type of service (federal, state, local, private)
- Source of financial support
- Hours of service
- Geographic area served
- Eligibility requirements
- * Qualifications of the staff
- Physical accessibility (ramps, parking, public transportation)
- * Service capacity/availability of services
- Meetings of or sponsored by the resource
- Goal or purpose
- Methods of obtaining service
- Speakers available
- Published materials available
- Subject headings and "see also" references
- Provision of service to non-English-speaking people, specifying language

(* This information is not asked for but is included in the file if the information is volunteered.)

BALTIMORE COUNTY PUBLIC LIBRARY

COMMUNITY INFORMATION FILE
DATA COLLECTION FORM

DIRECTIONS: A 5"x8" card file entry for your agency will be prepared from the data which you supply on the form below. Please do not hesitate to give us as much detail as you wish. If you run out of space for any answer, just use the back of a sheet or attach extra sheets. If you are uncertain about how to fill in a section, put a "?" in the space. After you have returned the questionnaire, we may contact you by phone to fill in the gaps.

NAME OF ORGANIZATION:

ACRONYM:

ADDRESS:

City:

State: Zip:

TYPE OF AGENCY:

__ Federal
__ State
__ County
__ City
__ Private non-profit
__ Profit-making

PARENT ORGANIZATION: (If any)

PHONE NUMBER(S):

DAYS & HOURS FOR PHONE SERVICE:

NAME OF PERSON IN CHARGE:

TITLE:

PHONE:

PURPOSE OF ORGANIZATION: State briefly. (Space for specific services and/or activities is provided on the following page.)

GEOGRAPHICAL AREA SERVED:

6/78

Exhibit VIII-A. Data Collection Form, Baltimore County.

SERVICES AND ACTIVITIES: Please describe each specific service or activity of your organization in a separate section below. If you are describing more than two distinct services, please use the space provided on the back of this sheet.

SERVICE/ACTIVITY #1:

1. Describe the service or activity:

2. Name the person to be contacted concerning this service or activity:
   Name: Title:
   Phone:

3. List the days and hours this service or activity is offered:

4. Describe any eligibility requirements for this service or activity (age, sex, marital status, residency, membership, etc.):

5. How does one go about obtaining this service or taking part in this activity?

6. List any fees for this service or activity:

SERVICE/ACTIVITY #2:

1. Service or activity:

2. Contact person: Title:
   Phone:

3. Days and hours:

4. Eligibility requirements:

5. Obtaining this service: 6. Fees

If you have more services or activities, use the form on the back of this sheet.

SUPPLEMENTARY INFORMATION: If the answer to a question is "NO," please go on to the next question.

1. Are you a membership organization? ☐ YES ☐ NO

   - List any qualifications for membership (sex, age, sponsor, etc.):

   - List any membership fees:

   - Are regular meetings held?
     Place:
     Days and hours:

   - Are officers elected?
     How often?:
     Month:

2. Do you have any branch offices? ☐ YES ☐ NO

   Please list branches below or attach a sheet.

Name	Address	Phone

3. Do you produce a newsletter or other regular publication? ☐ YES ☐ NO

   Please list the title(s) below:

   (We would appreciate receiving copies on a regular basis for our central files. Please add us to your mailing list if you will.)

4. Can your organization accommodate people who are not fluent in English? ☐ YES ☐ NO

   Which languages?:

5. Do you have any special facilities for the handicapped? ☐ YES ☐ NO

   Please specify:

THANK YOU FOR TAKING TIME TO COMPLETE THIS FORM AND FOR INCLUDING A COPY OF ANY BROCHURES OR OTHER PRINTED MATERIALS THAT YOU WOULD LIKE US TO HAVE.

Form completed by _____ Date _____

The main file is supplemented by a separate 5x8 index file. In the index file the resources are indexed using a subject heading list in layman's language. The original subject heading list was drawn from Detroit's I&R service, expanded to match needs unique to Baltimore County. Both the main file and the subject index are cross-referenced. The types of resources in the file include the following:

- Churches*, if they offer community services, such as day care
- Clubs and associations
- Entertainment events and recreation facilities
- For-profit organizations, if their service or products are unique or hard to find
- Non-profit organizations such as thrift stores and the Salvation Army
- Government services, including all Maryland State and Baltimore County services
- Political organizations, civic or neighborhood groups
- Service agencies

(* Each branch keeps a file of churches in its own locality.)

Branches collect information within their respective areas. After the information on a given resource is in hand, the branch staff forward it to the Clearinghouse, where the information is taken off the Data Collection Form and put into standard format on 5x8 cards are then multilithed and distributed to all relevant branches in the system. The Clearinghouse staff themselves are responsible for collecting information about resources that are county-wide or that exist outside the county (for instance, in Baltimore City, Annapolis or Washington, D.C.). Of course, the cards for such resources are sent to every branch in the system.

The Clearinghouse staff also revise the 5x8 index cards and distribute these to the branches. The branch staff maintain the main and index files -- adding and deleting cards -- and report changes in information on the cards to the Clearinghouse, as changes arise.

All resouce cards are updated once a year, or more frequently if there is need. A copy of the card with a stamped return envelope is sent to the resource with the request to update; follow-up is done by telephone. The Clearinghouse is responsible for updating all county-wide organizations; the branches, for updating organizations in their own communities. The branches also have the option of doing the whole updating operation by telephone. The response to requests for updated information is remarkably close to 100%.

The branches and the Clearinghouse maintain their own Back-Up Files of pamphlets, brochures, newsletters and other ephermera on various resources and topics of need to supplement information contained on the file cards.

Back-up files in the branches are filled from two sources: the Clearinghouse collects and distributes material to the branches; and the branches collect material on their own. The Back-Up File is arranged alphabetically by resource or subject, corresponding in some degree with the entries in the Community Information File or its index.

The BCPL staff as a whole consider the subject scope of the file to be very good. The currency of the file is rated to be as good as it could be considering the time lag involved in updating. The consensus was that the Clearinghouse does a good job in providing up-to-date information for I&R. Given the format of the file, the depth of information on resources was considered to be good; while some staff wished for more description of the services, most felt that more detail would make the file cumbersome.

The arrangement of the file, alphabetical by service provider, was rated very good by a majority of the staff. Even those who rated it as "good" felt that there was not a better way to do it. The adequacy of access -- the subject index -- was felt by the staff to be good. The majority of the staff felt that there would always be a need for revision. The staff members who have used the subject index from its beginning in 1975 expressed the opinion that it is much more usable now that it has been tailored to Baltimore Countians' needs.

The staff is accustomed to the physical format of the file, 5x8 index cards, and has no difficulty in using it. A branch staff member expressed a preference for a microform format in order to have more information on each agency. The Clearinghouse staff would like to see the file on-line for ease of updating and for the ability to publish mini-directories on selected subjects. One Clearinghouse staff member felt that an edition of the file on microfilm, integrated with the COMCAT (the public catalog, in microform) would make the public more aware of the available services. However, having the file on-line and/or on microform were seen as <u>additions</u> to the 5x8 index card file and not as replacements. As of this writing there is a great likelihood that the library will acquire a word processor with a records management capability. This will enable staff to generate custom-made lists of resources, such as a list of day-care facilities within a given zip code. If the resource file were to be made available on-line to the public via the word processing equipment at all current access points, the card format of the file would be abandoned, in all probability.

E. I&R SERVICE DELIVERY

A client approaches the I&R service through the branch staff. The Clearinghouse is rarely accessed directly, since it is not publicized and is not visible to the public. The staff at the branches may use any directory -- such as a neighborhood directory, Enoch Pratt Free Library's resource file, the Yellow Pages, government directories or their Back-Up File in addition to the resource file to answer I&R queries. All sources at hand are exhausted before the Clearinghouse is called. At this point the staff member may either transfer the client to the Clearinghouse or may become the liaison between the client and the Clearinghouse.

The Clearinghouse staff participate in the regional I&R Planning Council which includes the regional Health and Welfare Council, Enoch Pratt Free Library, as well as Cecil, Harford and Carroll County public libraries. Communication and file sharing with the three county libraries is basically one way, flowing from BCPL to these libraries. With the Health and Welfare Council and Pratt there is dialogue and mutual file sharing. The Clearinghouse staff view the two-way communication with these two agencies as necessary in order to avoid duplication of effort.

F. EXTERNAL RELATIONS

In the beginning, the branch staff held community walks to gather information in their areas. They also attended meetings of local organizations to learn more about these organizations and to explain AID (as it was then called) to them. During National Library Week in 1975 the Catonsville demonstration branch manned AID displays at local stores to promote this new service. Also at Catonsville, the staff spoke about AID to all groups who used the library meeting room.

Although there were no formal community advisory boards, BCPL interpreted the Warner report as evidence that the community needed this type of service. The Library saw this well-documented public need as an opportunity to serve the public more fully and to strengthen the library's position in the community.

Relations with other agencies that provide I&R service seem to be cordial if not cooperative. While there is some overlap in I&R service delivery, and some business is thus drawn away from the library, the Clearinghouse agencies that provide more or less omnibus I&R are the Mayland Division of Community Affairs (using BCPL's resource file) the Department of Aging; the Health and Welfare Council of Central Maryland; and Enoch Pratt's I&R service (INFER: Information For Every Resident).

Since the beginning of its I&R activities, BCPL has cooperated -- at times closely -- with the city's Health and Welfare Council Information and Referral Service. At the outset it was decided that the two organizations would share information that they had collected about resources. Consequently, the Council turned its total resource file over to BCPL and AID was thus able to open for service several months earlier than would otherwise have been possible. Since then they have been sharing all new information received about resources in the region.

Cooperation with Enoch Pratt's INFER, the counterpart to AID, has grown in the past few years as INFER itself has drawn on the AID staff and files in reviving itself from several years of inaction.[4]

Cooperation from resource organizations is reflected clearly in the high rate of return of requested updating information. Since there is little follow-up after referring a client to a resource, receptivity to BCPL referrals by the resource organizations is uncertain. As a positive indicator, however, resources do accept the referrals. Rarely do they attempt to turn a BCPL-referred client away.

G. ADMINISTRATION

Originally, the Clearinghouse was devoted solely to I&R support. However, after service to the public was initiated in the branches in 1975, a reorganization was effected and the Information Services department came into being. It incorporates both I&R support and traditional reference support for the whole system, and is, in effect, the old Clearinghouse with an enlarged function.

Exhibit VIII-B shows the place of Information Services on the organization chart. Both Information Services and all the branches fall under Users Service. The Information Services Department, or Clearinghouse, is a division of Information and Programming Services. It is staffed by three professionals (one, the Head of the department), and two clerical workers. The Head of the department was previously in charge of the I&R operation at Enoch Pratt Free Library, and was hired by BCPL to head up its I&R operation after the original head of AID left the system.

Typical of many public library services around the country, BCPL's I&R began life with a name -- first, Community Information Desk, then Accurate Information Desk -- and collected statistics on "I&R" vs. reference transactions. Eventually managment came to believe that the distinction between I&R and traditional reference was untenable in the public mind and perhaps even in the minds and activities of the staff. Clients would call the library, request "AID service" and then pose a traditional reference question ("What is the altitude of Denver?"). Similarly, staff receiving queries often found that a so-called I&R query might be partially answered through a traditional reference source, and vice versa: the answer to a traditional reference query might be augmented from the resource file. Therefore, in 1978 I&R became nameless and was merged more than ever with the general information-giving function of BCPL.

I&R is provided by all professional service staff as a part of information-giving services. Training for information and referral, other than that given initially (Section B) is included in the general library orientation given to new employees. This orientation is not training to use the file or how to handle an I&R query, but is a general introduction to the file and its uses. Training in how to provide I&R is provided in the branches for each new professional employee as part of a formal training checklist. Occasionally system-wide workshops, attended by a majority of professional staff, feature I&R. Several staff expressed the opinion that additional formal training could be used by both new and old employees.

From June 1974 through March 1975, $54,000 of LSCA demonstration funding and $10,000 of BCPL funds covered all costs during the planning, implementation and demonstration stages. In the second year of the project (June 1975 to

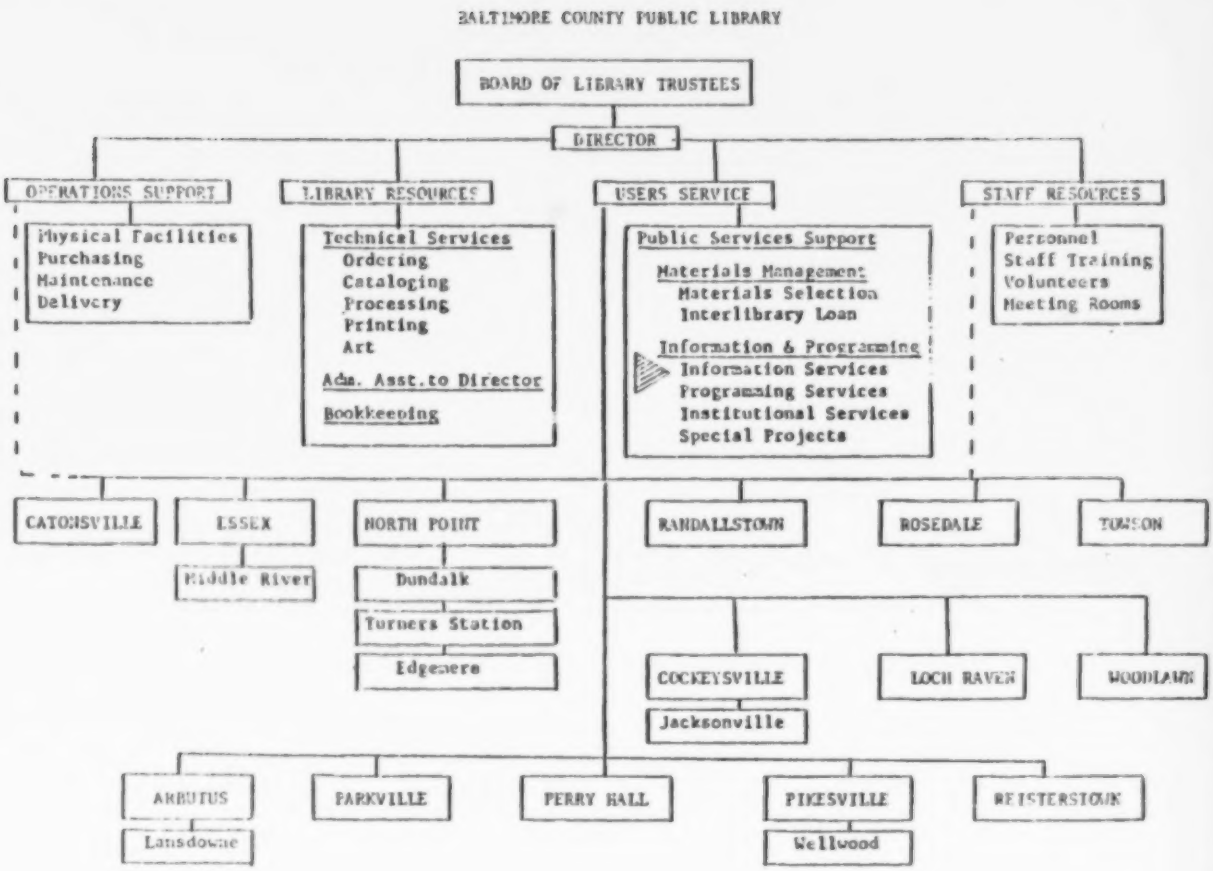


Exhibit VIII-B. Organization Chart, - Baltimore County.

July 1976) of the $83,500 that was spent on I&R, approximately 40% came from local funds.

Publicity costs during the first year were about $5,000. The publicity included newsletters to staff and public, brochures, displays, poster, billboards and ads and features in newspapers. See Exhibit VIII-C. In the second year of the project, the publicity costs were about $30,000 and included radio advertising ($20,000) and TV spot production ($9,800). About $200.00 was spent for printed materials. Not accounted in the publicity costs are the talent and time of a local advertising agency that donated advertising copy and illustrations for the initial campaign.

Ongoing publicity (1978-79) consists of brochures, displays and bookcovers available in the library and distributed to school students during booktalks. The brochures include a general one about the types of questions that the library can help with, one on consumer problems and one for expectant parents. BCPL staff also have:

- produced and aired two public service announcements on I&R (radio)
- developed a slide/tape presentation on I&R, "You Should See Us Now," for use at public meetings
- run regular columns that feature I&R service in the library's Report to the Reader
- included a column called "info-Line"-- a question-and-answer feature -- in the library's bimonthly Calendar of Events
- at several junior high and high school held "Stump the Librarian" programs, in which librarians explain the library's information services (including I&R) and answer students' queries from the Community Information File and a few basic reference books.

From 1978-1979 the Library ran a syndicated column related to I&R queries in several community newspapers. This was discontinued because the papers wanted strictly local material, and it became too burdensome for the library staff to tailor a different column for each paper.

From the point of view of I&R, per se, the history of administrative support for I&R would probably be considered strong but not overwhelming. As the service was getting started, top management evidenced appropriate levels of support -- attending training sessions and working closely with the consultant and regular staff in planning and trouble-shooting. Even then, however, rather than demonstrating a landslide of enthusiasm for I&R in and of itself, top management seemed to be viewing I&R as an important component in BCPL's total package of information-giving services. Since

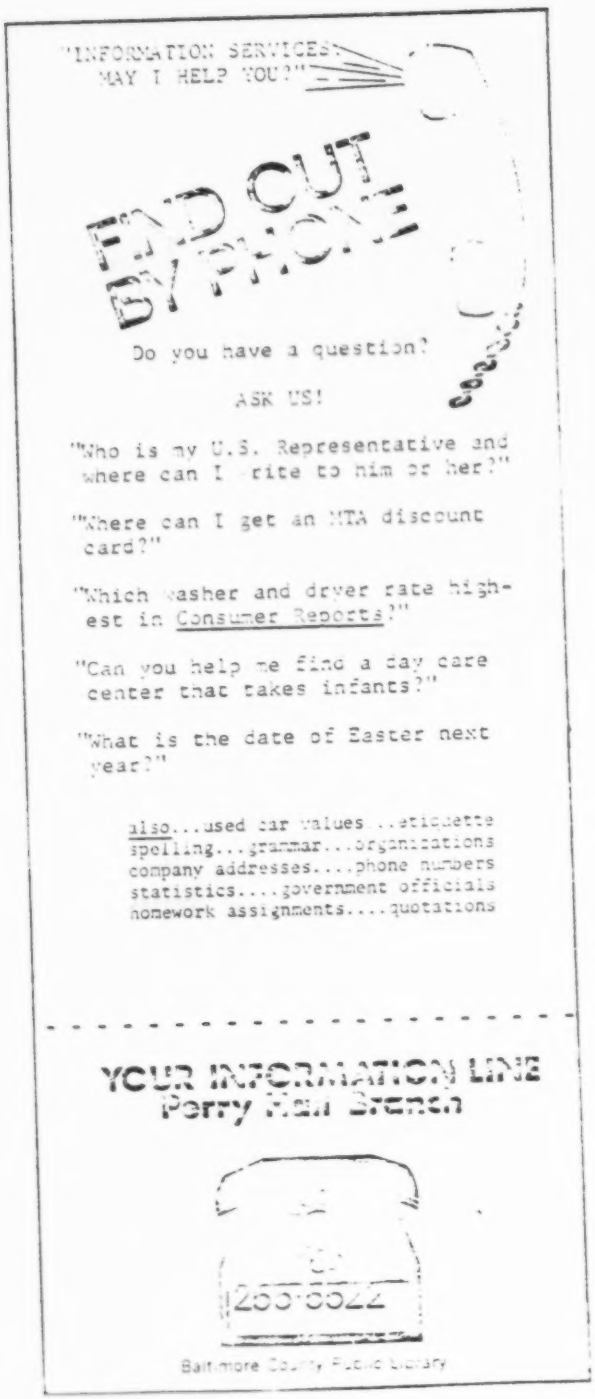

"INFORMATION SERVICES.
MAY I HELP YOU?"
FIND OUT
BY PHONE
Do you have a question?
ASK US!
"Who is my U.S. Representative and where can I write to him or her?"
"Where can I get an MTA discount card?"
"Which washer and dryer rate highest in Consumer Reports?"
"Can you help me find a day care center that takes infants?"
"What is the date of Easter next year?"
also...used car values ..etiquette
spelling...grammar...organizations
company addresses....phone numbers
statistics....government officials
homework assignments....quotations
YOUR INFORMATION LINE
Perry Hall Branch
Baltimore County Public Library

Exhibit VIII-C. Example of Publicity, Baltimore County.

then, management has accorded to I&R the resources that such a view justifies -- providing consistent support in training, staffing and materials even in the years after LSCA funding. To a staunch advocate of I&R, it may appear from the outside that by incorporating I&R into the package of information-giving services -- including the elimination of a separate name for I&R service -- the library management has lessened the importance of I&R. However, the concern with ongoing training in I&R techniques, the continued staffing of the Information Services Department, and the expensive technology for the resource file all are evidence that I&R remains a major interest of management. That interest is manifested in a service that is highly integrated into the total information program of the library.

H. I&R IN THE CONTEXT OF OTHER SERVICES

I&R is a part of what library management class as "True Information Transactions", which also includes reference service, readers' advisory service and instruction in the use of materials. It was always the conception of BCPL to introduce I&R as an "extension of reference" and to use existing staff to provide all information services to the public. Integration of reference, readers' advisory, instruction and I&R into Information Services has given birth to the concept of an "information generalist." All public service professionals share responsibility for providing the whole program of information services to adults and children.

BCPL staff see I&R as "going that extra mile," "filling holes," and "providing a fuller way to do reference." They feel that having the information of the resource file at hand has enriched reference services and broadened the whole concept of information-giving. The majority of the staff feel that there is no line between I&R and reference -- that one enhances the other. Even staff members who were at BCPL before 1974 stated that I&R and reference are no longer thought of as separate services.

At first the idea of giving information on or referral to resources outside the library was upsetting to some staff. Giving information from a book or any print source was seen by them as the proper service. Other staff had a propensity to serve the community with I&R-like service even before discussion of I&R began in the early '70's. The general service attitude of the staff has historically been pro-active and strongly community-oriented. These existing inclinations naturally fueled the formal innovation of I&R. Now I&R seems to almost completely assimilated by the whole staff as a regular information service. When pressed, the staff define I&R as being a "service," "going outside the library," "answer not in a book," or "use of the file." Reference was defined as "information," "in a book," "research," and "not using the file."

I. EVALUATION

BCPL collects, on a sampling basis, statistics on:

- factual questions answered
- readers' advisory and subject requests
- instructions in use of search tools
- title/shelf checks
- reserves
- direct loans
- referrals
- requests for program information

From these sampled data a yearly total is estimated. See Exhibit VIII-E for definitions of the categories. A sheet without definitions is used as a tally sheet. The "I&R question" category was added for this study.

In 1979, the number of total transactions system-wide was a little more than 1.4 million. In the early days of I&R, the staff also attempted to count the number of I&R transactions, as distinct from other kinds of transactions. The difficulty that has been documented throughout this report -- namely, distinguishing I&R from reference in a clean way -- plagued the BCPL staff, too, and they abandoned the collection of I&R statistics. In fact, it is probable that this statistical frustration contributed to the decision to integrate I&R and reference into a single information function.

TRANSACTION SURVEY

The survey instrument was pretested here in selected branches and the staff were the first ones instructed in data collection for this study. Data collection for this study was merged with the data collection that staff ordinarily perform on randomly selected working days. Based on management's estimate of I&R volume, it was deemed sufficient to record information about the first four I&R transactions on seven sampling days in January and February. This would produce about 400 completed interviews -- a number that would be sufficient for the crosstabulations that were contemplated for the final analysis. However, we were surprised. Many fewer I&R queries were recorded. This was due in part to lapses in interviewing and in part to an overestimate in the volume of I&R queries taken in. To compensate, four days in April were added to the original sample days, and all I&R queries on those days were included. This did not compensate for the shortfall, and the total completed interviews in BCPL came only to 212. The total I&R queries tallied was 384. Despite the considerable irregularities in data collection, we have assumed that the transactions analyzed here do represent approximately the kind of queries and responses at BCPL during the survey periods.

In Exhibit VIII-F are the frequencies of the responses to the interview.

INFORMATION DESK - SERVICE PATTERN SAMPLE

DATE _____

CIRCLE ONE: A J J/A

BRANCH _____

TRANSACTION	WALK-IN	PHONE
SPECIFIC INFORMATION ORIENTED QUESTIONS	Include here all transactions in which a patron requests or receives specific information or factual data, either through a librarian's verbal response or through materials which the librarian supplies. Examples: In what year was Love Story published? Do you have a recipe for baked Alaska?	
READERS ADVISORY & SUBJECT REQUEST	Include here all transactions in which the patron requests or receives assistance in selecting materials, including books, periodicals, records, films, etc. Examples: Can you help me find a good love story? Do you have any dessert cookbooks?	
INSTRUCTION IN USE OF SEARCH TOOLS	Include here all transactions in which a patron receives instruction in the use of library search tools, either in response to a specific request for instruction or as a means of obtaining requested information. Search tools include microfilm catalog, indexes, Readers Guide, and other basic search tools. Do not include microfilm readers and copy machine assistance here.	
TITLE/SHELF CHECK & PERIODICAL REQUESTS	Enter a tally mark for each title or periodical requested by a patron, either by phone or in person, when the librarian goes to the shelf to locate the item or ascertains that it is/is not owned by the system.	
RESERVES	Enter a tally mark for each reserve card completed.	
DIRECT LOAN	Enter a tally mark for each transaction in which you distribute a Direct Loan flyer, explain the direct loan process, contact ILL or any other branch to determine the location of materials. Use a single tally mark for each transaction in which one or more of these activities occur. Note that all referrals to branches within BCPL should be included here.	
REFERRALS	Include here all transactions in which a patron is referred to another agency, institution or individual outside the library to obtain the information and/or service requested.	
PROGRAM INFO & TICKET REQUESTS	Include here all requests for information about library programs and/or ticket requests. Count each request, not each ticket.	
OTHER	Include directions for locating restrooms or telephone, library staff, or materials when the patron has a call number; location of phone books, records, business section, etc.; supplying paper or pencils; checking in toys; help with copy machines or microfilm readers; explaining library policies and procedures; library/bookmobile schedule information; handling sequestered materials; etc.	
I&R QUESTION	Involves giving information about, or making contact for a patron with, a resource outside the library (not another library). May require the use of the CIF or other printed or unprinted directories.	

Assistance to any one patron may require multiple entries. Enter a tally mark in all applicable categories.

IS 11/78

Exhibit VIII-E. Definitions for Tally Sheet. Baltimore County

BEST COPY AVAILABLE

/ Agency call (answer only questions 9-12)

__ No response (answer no questions)

PUBLIC LIBRARY INFORMATION AND REFERRAL PROJECT

Branch _____
Date _____
Time _____

We're trying to improve our service. Would you help us by answering a few questions? We won't record your name and it should take only one minute.

1. Have you used the library's information service before — the one you're using now?

   [ ] Yes [ ] No [ ] Don't know

2. Have you used any other service of this library system?

   [ ] Yes [ ] No [ ] Don't know

   IF YES:

   [ ] Was it within past 3 months?
   [ ] Was it within past year?
   [ ] Was it longer ago? (Or don't remember)

3. How did you learn of the library's information service?

   [ ] Friend, neighbor, relative
   [ ] Library staff
   [ ] Referred by an agency
   [ ] Radio
   [ ] Television
   [ ] Newspaper
   [ ] Other

4. Have you asked your question in any other places before coming to the library? (You don't have to name them.)

   [ ] Yes [ ] No

5. I'll read some age groups. Just stop me when you hear yours. [Interviewer: Omit obviously wrong groups when possible.]

   a[ ] 13-19
   b[ ] 20-35
   c[ ] 36-45
   d[ ] 46-64
   e[ ] 65 or over
   [ ] Declined to state

6. I'll read some groups based on years of education completed. Just tell me when you hear yours.

   a[ ] College graduate
   b[ ] Some college
   c[ ] High school graduate
   d[ ] Some high school
   e[ ] 8th grade or less
   [ ] Declined to state

7. In which of these groups did your total family income, from all sources, fall last year -- before taxes, that is? I'll read the groups.

   a[ ] Up to $8,000
   b[ ] $8,000 to $14,000
   c[ ] $14,000 to $20,000
   d[ ] $20,000 to $26,000
   e[ ] Above $26,000
   [ ] Declined to state/don't know

That's all the questions. Thank you very much for your help.

INTERVIEWER TO FILL OUT REMAINDER:

8. Sex of patron

   [ ] Male [ ] Female

9. Mode of inquiry

   [ ] Telephone [ ] Visit

10. Topic of question (check all that apply)

    [ ] Money matters
    [ ] Consumer issues
    [ ] Housing/hshld. maint.
    [ ] Health
    [ ] Job-related issues
    [ ] Transportation
    [ ] Education
    [ ] Neighborhood issues
    [ ] Recreation, sports
    [ ] Family relations
    [ ] Crime & safety
    [ ] Legal matters
    [ ] Child care
    [ ] Other

11. Disposition of question (All that apply)

    [ ] Information was given
    [ ] Information was given after interview to probe underlying need
    [ ] Librarian contacted a resource on patron's behalf
    [ ] Other (Specify)

12. Was question answered (or referral made) from a resource file created by the library?

    [ ] Yes [ ] No

Exhibit VIII-F. Survey results, Baltimore County.

Day of the Week: n=211

Sun	2	**Thurs**	7
Mon	46	**Fri**	4
Tues	24	**Sat**	7
Wed	10		

Typology of Education and Income: n=182

Low educ, low income	7
Low educ, hi income	10
Hi educ, low income	20
Hi educ, hi income	63

Exhibit VIII-F. Survey results, Baltimore County (cont.).

Prominent findings include:

- Few I&R calls come from agencies
- About 2/3 of the I&R clients have used "this service" before. (In the case of a fully integrated service, such as BCPL's, it is more than usually difficult to know what the client means by "this service." I&R, reference, general information-giving, talking with a professional librarian, etc.)
- The vast majority of I&R clients have used other library services before, and over 90% could be considered "regular" users (last use within the past year)
- The media play a relatively small role in publicizing I&R
- In learning of the I&R service, "other" accounted for 34% of the response and included such things as flyers and signs, the assumption that the library provided such a service, a comment by a teacher, and prior contact with the library
- Slightly over 30% of the clients have posed their queries at other places before coming to the library
- The plurality of the clients is in the 20-35 age group
- Over 60% have at least some college education
- Family income is fairly evenly distributed among the categories, with two modes in the $14,000-$20,000 and the Above $26,000 categories
- The proportion of phone queries -- 51% -- is substantially less than for the other sites, except San Mateo
- Simple Information-Giving was provided in the great majority of cases. The staff contacted a resource in about 8% of the cases -- more than at any other site except San Mateo
- In about 2/3 of the cases, the "AID" file was used in responding to the client

The crosstabulations performed for other sites were performed for BCPL. Those that generated corrected chi-square of better than .05 significance were examined. The meaningful crosstabulations for BCPL include:

- Staff tend to provide Simple Information-Giving most of the time, but are more likely to respond in a different way -- complex information-giving or referral -- from 11-12 a.m.,

and 4-6 and 7-9 p.m.

- Clients falling into the middle income bracket, $14, 000- $20,000, are less likely to have used the service before
- People asking sports-related queries are less likely to have used the service before
- The men asking I&R queries are more likely than the women to be college graduates
- Men are more likely than women to visit rather than phone the library with an I&R query
- Men are more likely to ask job-related queries
- Consumer queries are more likely to be phoned in rather than brought in
- Clients who visit the library are more likely to get a response other than simple information-giving -- usually complex information-giving
- Money matters predominate among the 13-45 age groupg and fall off considerably after that
- People with consumer-related concerns are more likely to have learned about the service from friends, neighbors and relatives than from other sources

There are two instances where the study variables associate significantly with the "typology" of education-plus-income that was composed out of the education level and family income variables.

- People in the high education-low income and high education-high income categories tend to have used other library services prior to using I&R
- People falling into the low-education-low income category are more likely than others to have posed their query at another place before turning to the library

STAFF ASSESSMENT

The staff felt that the public's image of the library as a "book warehouse" has been and still is changing. People are seeing the library as an obvious place to get information which is not necessarily book-bound. With the library becoming more visible to the public, the library has become more receptive to public needs.

On the whole, resource agencies feel that the library is an appropriate place for I&R.

The Clearinghouse staff, being in a position to receive feedback from the county government, stated that the library's relation with the county government has always been very positive. The County has always been supportive of the library and is also supportive of its information services. The greater visibility of the library due to its expanded information services

can be seen in the fact that county government employees call the library for information and feel comfortable doing it.

Staff opinion was that weakness in answering I&R queries is due to staff time. The branch staff stated that they do not always have enough time to answer a query fully or provide "true referral." Many staff members also expressed a need for refresher workshops in I&R. The Clearinghouse staff mentioned a need for on-line capability to produce mini-directories in order to disseminate information more widely. While the staff as a whole felt that more publicity would bring in more business, the administration stated that a saturation policy effort equivalent to the 1975 campaign would generate requests in numbers that could not be handled by the existing phone equipment or staff; for the publicity would probably generate not just I&R queries, but requests for all library services, as happened in the 1975 campaign.

All told, the staff felt very good about how I&R is operating in Baltimore County. Support seems to come from all levels -- from the top and middle levels of managment -- and the public are accustomed to the service and would likely miss it if it were to vanish.

ENDNOTES

1. Vernon E. Palmour and Marcia C. Bellassai, To Satisfy Demand: A Study Plan for Public Library Service in Baltimore County. Arlington, VA: Center for Naval Analysis, 1977.

2. Joseph Green. "Urban-Suburban Public Library Statistics." Bowker Annual of Library and Book Trade Information, 25th ed. New York : Bowker, 1980. 385, 387.

3. Refer to Edward S. Warner et. al. "Information Needs of Urban Residents," Final Report. Washington, D.C. : U.S. Department of Health, Education and Welfare, Division of Library Programs, December 1973.

4. For a history and analysis of Enoch Pratt's first venture into I&R, see Joseph C. Donohue. "Some Experiments Fail: The Public Information Center Project at the Enoch Pratt Free Library." Library Journal 100 (June 15, 1975): 1185-1190.

CHAPTER IX

SAN MATEO COUNTY

A. THE SITE

THE COUNTY

San Mateo County is located south of San Francisco on the penisula between San Francisco Bay and the Pacific Ocean. Within its 454 hilly and verdant square miles are 19 incorporated cities. The estimated population in 1979 was 582,000 people, 88% of whom lived in urban areas. In 1980, 11% of the population were projected to be 65 years old and above; 33% were projected to be under 24 years. About half of the population is in the labor force. Fourteen percent of them are in manufacturing; 27% in the wholesale and retail trades; and about 13% in local and federal government. The median family income in 1970 was $13,222, compared with a national median of $9,596. At that time, 39% of the families had incomes above $15,000. [1]

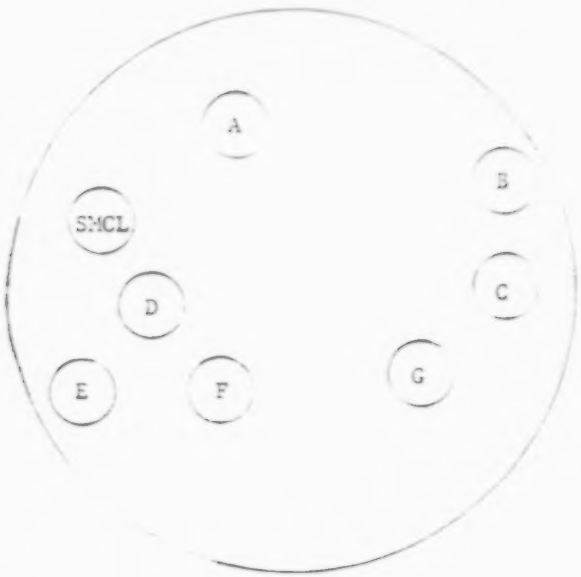
THE LIBRARIES OF SAN MATEO COUNTY

In San Mateo County there are eight autonomous libraries, with a total of 31 outlets. The largest library is the San Mateo County Library (SMCL) with 13 outlets (central library and 12 branches) and two bookmobile routes. The smallest is a single-outlet library serving 4,000 people.

The governing body of SMCL is the County Board of Supervisors who serve as the Library's trustees. The service area of SMCL includes about one-half of the county's population. In fiscal year 1978 the library's operating budget was $3.5 million. Outlets were open a total of 752 hours per week, and circulation was 1.4 million a year. However, the June 1978 passage of Proposition 13 and the concomitant reduction of real estate taxes across the state greatly reduced the library's ability to provide services, despite special "bail-out" funds distributed to local governments by the state. The fiscal year 1979 budget was decreased by $1.4 million. Consequently, hours were decreased by 48% (two branches were closed), and circulation dropped 31%.

In 1970, the eight autonomous libraries in San Mateo County formed a cooperative named the Penisula Library System. PLS provides access to collections and services of all member libraries for the citizens of each community in San Mateo County. Also, through PLS, the member libraries have access to:

- the Cooperative Information Network based at Stanford University, which provides access to academic, business, public and technical libraries in San Mateo, Santa Clara, Monterey and Santa Cruz Counties
- the Bay Area Reference Center at the San Francisco Public Library
- the California State Library
- and other interlibrary loan sources through the PLS interlibrary loan center.



The circled letters above represent the autonomous libraries of San Mateo County, one of which is the San Mateo County Library. All are bound together voluntarily in the cooperative organization, the Peninsula Library System.

The focus for this chapter will be San Mateo County Library. Other library organizations -- especially the other autonomous libraries in the County and the Peninsula Library System -- will be referred to as they arise in the context of SMCL and the Community Information Project.

B. ORIGINS OF I&R

In the early 1970s many organizations in San Mateo County became aware of the need for information and referral for the citizenry. The resulting proliferation of I&R services, hotlines and directories produced by various organizations and agencies, rather than solving the I&R problem, compounded it, increasing the average citizen's confusion in trying to use the community's resources. Information Consortium (ICON), a group of social workers, librarians, probation officers and educators interested in I&R programs began working toward a single automated community information file for San Mateo County. Because of the volunteer basis of ICON and the extensive work required for the development of a file, the group's goal was never fully realized. However, the application for LSCA funding grew out of ICON's efforts.

About the same time, the coordinator of young adult services of SMCL began accumulating a 3x5 card file of community services. The file was oriented to serve the general public -- that is, no special group -- and it was made available in every branch.

In 1972-73, the Peninsula Library System received LSCA funds for a reference demonstration project to compile a directory of people and organizations willing to give help or information. This directory, called "Inforama," has its beginnings in the 3x5 file started by the coordinator of young adult services of SMCL.[2] For the first compiliation of the Inforama file -- in 5x8 looseleaf format -- PLS contracted with an information specialist. Thereafter the file was maintained as a joint effort of all libraries in PLS, through the Inforama Committee. The Inforama effort continues today.

In 1974, PLS, viewing the librarians in the County as a ready talent for organizing, managing and disseminating community information, applied for and was awarded LSCA funds for a two-year I&R demonstration project. From the outset this project, called the Community Information Project (CIP), was to be a computerized file utilizing the Stanford Public Information Retrieval System (SPIRES) and accessed by teletype machines already in place in 18 libraries throughout PLS. The use of SPIRES allows CIP to have a centrally maintained file and decentralized delivery of I&R service.[3]

The Community Information Project, working out of the CIP office, began collecting information on resources to include in the file in the summer 1975. In order to avoid an overlap with "Inforama," emphasis was placed on human services resources. Half-day workshops were held in the autumn for all librarians in the Peninsula Library System. The purpose of these workshops was to explain CIP and to give instruction on interviewing techniques and searching the CIP file. The Director of CIP also visited all library outlets with teletype machines and instructed the reference and clerical staff in using them to access CIP. Additionally, an effort was made to introduce CIP to all new staff joining member libraries.

The Resource Staff of the San Mateo County Department of Public Health and Welfare were involved with the Community Information Project from its inception. Their mandate is to provide information and consultation to staff of the Department of Public Health and Welfare and other non-profit agencies about the human services system in the County.

The Resource Staff were members of the Information Consortium. They also served in an informal advisory capacity to the CIP Director and assisted her in presenting CIP workshops to librarians. Thus, by virtue of formal and informal personnel contacts and because the automated CIP file could help the Resource Staff provide community information, the Community Information Project and the Resource Staff came to work together on I&R. In 1976 the Resource Staff obtained a portable computer terminal and began using the CIP file.

C. I&R SERVICE CONCEPT

The target of the Community Information Project (CIP) has been and continues to be the entire population of San Mateo County.[4] However, two subgroups for whom the service would be especially useful were identified as special targets at the outset. These were the economically and socially disadvantaged, and those people who work for the city and county governments and social service agencies. It was therefore decided to focus the service on helping (1) professionals and volunteers and (2) all people with human service needs, with the realization that the economically disadvantaged would be major beneficiaries. Initially, the CIP file was to be accessed by all Peninsula Library System outlets that had teletypewriters. At that time the Resource Staff of the County's Department of Public Health and Welfare Social Service Division, together with the County's Senior Adult I&R Coordinator, were maintaining a manual file of human service providers. Moreover, the Resource Staff were actually providing information and consultation about human services to professionals and volunteers, but not to the public. During 1975-76, the Resource Staff and CIP Staff began to combine their files and develop a cooperative working agreement.[5] The benefits of this joint effort were:

- to make more effective use of the limited staffs of CIP, Resource Staff and Senior Adult I&R Coordinator
- to increase use of the CIP file
- to make available from all three offices computer listings and descriptions of needed resources.

The service objectives of the Community Information Project, as viewed by the Project staff, are currently to maintain the file and provide information from it to the Resource Staff, agencies and the public. <u>While CIP service is available to the public through the libraries, it is viewed by its managers primarily as a support service to agencies that provide I&R to the public</u>.

For direct access to the CIP file, the San Mateo County Library has teletypewriters in nine of its 12 branches and at the central branch. Any searches done through the teletypewriters incur a charge to the library for connect time. However, the librarian has the choice of directing the client to the CIP office or making a call to CIP on the client's behalf. There is no charge to the library for this indirect service. Branches without teletypewrietrs may direct patrons to SMCL central branch, to another branch with a teletypewriter, or to the CIP office.

In general, the staff consider SMCL's I&R service to be predominantly "I" and very little "R." The library's brand of I&R is seen as an approach to providing information -- as is reference service -- while the files are viewed as tools that increase a librarian's ability to do so. In addition to the Community Information Project file and Inforama, outlets of SMCL use locally-created files to answer questions. Also, in many areas of San Mateo County, the Department of Public Health and Welfare has Resource Centers that serve as a decentralized system of local I&R outlets. The centers, the Resource Staff of

DPH&W and the CIP office (indirectly through helping professionals and volunteers) are viewed by the librarians as places where a client might receive information about a problem and also the necessary help to solve the problem. It is predictable that the library staff might not view the Library as the place to do "R." Although the transaction survey indicated that librarians contacted an outside resource on behalf of the client in 10% of the cases, it is not known how many of such contacts were to the Resource Staff or local Resource Centers. (These two entities were considered to be outside the library; the use of the CIP file or the CIP office, or steerings to the central branch for possible CIP service was considered to be "use of CIP" in our survey.)

In June 1978, Proposition 13, an amendment to the California Constitution to limit real property taxes and to limit the legislature's ability to increase revenue through State taxes, was approved by voters, to take effect on July 1, 1978. This amendment's impact on revenue to libraries is best illustrated by the 48% decrease in hours open in SMCL branches in fiscal year 1979. This effect, with other effects both known and unknown, greatly depressed the morale of Library staff and quenched their disposition to long-range planning. Since "Prop 13" staff seems to feel that concentrating on anything other than staying open and providing basic library services has a very low priority. While all services would be affected by this concern, it may be that a new and potentially revolutionary service such as I&R would be affected all the more.

D. THE RESOURCE FILE

One full-time librarian worked for eight months, from December 1974 through August 1975, on initial CIP file development -- gathering information and working with Stanford University to set up the computerized file structure. About 130 entries were in the file as of September 1975. Since then, additional staff have joined CIP to help with building and maintaining the file. At present it contains about 1350 entries, including the following types of resources:

- government services
- service agencies
- political and civic organizations
- other non-profit organizations
- for-profit organizations, if not available in the non-profit sector (for example, low-cost divorce, counselling)

The information for each entry in the file includes the following, when possible:

- name, address and phone number of resource agency
- description of services or activities
- name and title of person to contact
- name of person in charge
- source of financial support
- hours of service
- geographic area served
- eligibility requirements, including fees
- availability of public transportation
- methods of obtaining services
- speakers available
- language spoken other than English
- use of volunteers
- keywords

Information for new resources to be added to the file is collected through a telephone interview with a potential resource. The file can be accessed through a terminal by resource agency name, city name, area served ("entire county" or city or neighborhood name), language spoken other than English, and keyword. The keywords used are controlled through a list of synonyms. There is no limit to the number of keywords an entry can have. Currently underway is a project to provide access to the file via a recently developed Human Services Classification System that has been mandated by the State. This taxonomy will augment the keywords, providing access to resources through both general ("mental health services") and specific ("grief counselling for the recently widowed") approaches.

An entry from the file can be printed in five formats: short format, "English" (the full information), agency name, and funding and mailing labels. See Exhibits A,B,C,D. Also available is an "English 2" format which consists of the English format excluding keywords. A copy of the file in the short format is used by the Resource Staff as a quick reference for telephone numbers and addresses.

Example of output in Short Format:

PENINSULA LIBRARY SYSTEM (1000B)
COMPUTERIZED COMMUNITY INFORMATION PROJECT (C.I.P.)
274 W. 20TH AVE.
SAN MATEO 94403

PHONE(S)
573-2061

HOURS
MONDAY-FRIDAY, 8 AM - 5 PM

PERSON IN CHARGE

TITLE
PROJECT DIRECTOR

Example of output in Mail Format:

CAN BE PRINTED DIRECTLY ONTO GUMMED LABELS

PENINSULA LIBRARY SYSTEM
COMPUTERIZED COMMUNITY INFORMATION
274 W. 20TH AVE.
SAN MATEO 94403

Exhibit IX-A. Short Format and MAIL Format. San Mateo County.

Example of output in English Format:

PENINSULA LIBRARY SYSTEM (1000B)
COMPUTERIZED COMMUNITY INFORMATION PROJECT (C.I.P.)
274 W. 20TH AVE.
SAN MATEO 94403

PHONE(S)
573-2061

HOURS
MONDAY-FRIDAY, 8 AM - 5 PM

PERSON IN CHARGE

TITLE
PROJECT DIRECTOR

SOURCE OF FUNDS
COUNTY GENERAL REVENUE SHARING, PENINSULA LIBRARY SYSTEM, AREA AGENCY ON AGING

FEES
NONE

AREA SERVED
ENTIRE COUNTY

PERSON TO CONTACT

DATE ADDED
04/06/78

DATE UPDATED
01/01/80

SERVICES
HAS DEVELOPED A COMPUTERIZED FILE OF INFORMATION ABOUT HUMAN SERVICES WHICH ARE AVAILABLE TO SAN MATEO COUNTY RESIDENTS. THE INFORMATION IS AVAILABLE TO THE GENERAL PUBLIC DURING ALL HOURS FROM 18 LIBRARIES THROUGHOUT THE COUNTY. (THE LIBRARIES ARE DESCRIBED SEPARATELY IN THIS FILE.) EACH TIME A REQUEST IS RECEIVED, A REFERENCE LIBRARIAN SEARCHES THE FILE OF MORE THAN 1200 SERVICES TO RETRIEVE ONLY THE MOST APPROPRIATE SERVICES.

HUMAN SERVICE PROFESSIONALS, PARA PROFESSIONALS AND VOLUNTEERS WHO NEED RESOURCE INFORMATION TO RESPOND TO THEIR CLIENTS' NEEDS OR TO OBTAIN AN EXTENSIVE LISTING FOR INVENTORY OR PLANNING PURPOSES MAY CALL THE PROJECT OFFICE OR THE RESOURCE STAFF OF THE DEPARTMENT OF PUBLIC HEALTH AND WELFARE SOCIAL SERVICE DIVISION. ARRANGEMENTS TO OBTAIN SPECIAL PRINTOUTS OF A PARTICULAR TYPE OF SERVICE OR OF AGENCIES SERVING A GIVEN AREA MAY BE MADE WITH THE PROJECT STAFF OR THE RESOURCE STAFF.

RESOURCES LISTED IN THE FILE ENCOMPASS ALL OF THE HUMAN SERVICES, INCLUDING BUT NOT LIMITED TO: LEGAL AID, SENIOR CITIZEN CLUBS, ALCOHOL ABUSE PROGRAMS, CONSUMER PROTECTION, FAMILY COUNSELING, AND RESIDENTIAL CARE FACILITIES. AGENCIES INCLUDED ARE PRIMARILY PUBLIC AND PRIVATE/NON-PROFIT. THE FILE IS CONSTANTLY GROWING AND IS EXPECTED EVENTUALLY TO INCLUDE 1500 SERVICES. SUGGESTIONS FOR ADDING NEW SERVICES TO THE FILE ARE ALWAYS WELCOME.

Exhibit IX-B. "English Format." San Mateo County.

KEYWORDS

INFORMATION, REFERRAL, COMPUTER, COMPUTERIZED, FILE, COMMUNITY, RESOURCE, HUMAN, SERVICE, INVENTORY, SOCIAL, DIRECTORY, NON-PROFIT, LIST, PUBLIC, DEVELOPMENTAL, DISABILITY, DISABLED, DEVELOPMENTALLY

Example of output in Funding Format:

1000

PENINSULA LIBRARY SYSTEM
COMPUTERIZED COMMUNITY INFORMATION PROJECT (C.I.P.)
SAN MATEO

DATE SURVEYED: 01/15/79

FUND SOURCE: COUNTY REVENUE SHARING
GEOGRAPHIC AREA: ENTIRE COUNTY

ACTIVITY	CURRENT YEAR	PERIOD	PRIOR YEAR
COM30	5,231	07/01/78 - 09/30/78	23,250

FUND SOURCE: COUNTY REVENUE SHARING
GEOGRAPHIC AREA: ENTIRE COUNTY

ACTIVITY	CURRENT YEAR	PERIOD	PRIOR YEAR
COM30	39,769	10/01/78-06/30/79	NA

FUND SOURCE: TITLE III, OLDER AMERICANS ACT
GEOGRAPHIC AREA: ENTIRE COUNTY

ACTIVITY	CURRENT YEAR	PERIOD	PRIOR YEAR
COM30	2,994	07/01/78 - 09/30/78	4,350

FUND SOURCE: SAN MATEO FOUNDATION
GEOGRAPHIC AREA: ENTIRE COUNTY

ACTIVITY	CURRENT YEAR	PERIOD	PRIOR YEAR
COM30	7,635	11/30/78 - 10/31/79	0

FUND SOURCE: LIBRARY SERVICES CONSTRUCTION ACT
GEOGRAPHIC AREA: ENTIRE COUNTY

ACTIVITY	CURRENT YEAR	PERIOD	PRIOR YEAR
COM30	0	07/01/78 - 06/30/79	12,000

FUND SOURCE: PENINSULA LIBRARY SYSTEM
GEOGRAPHIC AREA: ENTIRE COUNTY

ACTIVITY	CURRENT YEAR	PERIOD	PRIOR YEAR
COM30	4,000	07/01/78 - 06/30/79	0 10,000

FUND SOURCE: COUNTY CETA TITLE VI: PROJECTS
GEOGRAPHIC AREA: ENTIRE COUNTY

ACTIVITY	CURRENT YEAR	PERIOD	PRIOR YEAR
PLN00	8,741	10/01/78 - 02/07/79	NA

Exhibit IX-C. Funding Format. San Mateo County.

Example of output in Agency Format:

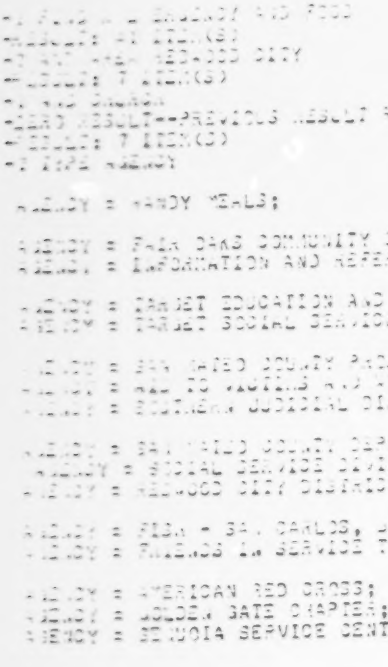


Exhibit IX-D. Agency Format. San Mateo County.

BEST COPY AVAILABLE

A grant from the San Mateo Foundation has recently enabled the CIP office to publish a directory which contains about one half of the entries in the file. Resources for the directory were selected on the basis of their being located in and serving San Mateo County. Resources based outside the County were included if their services were the only such available in the County. The publication, The Directory of Human Services for San Mateo County, 1980, is available for $16 to professionals in human services occupations; it is not available to the public. It is hoped that it will be eventually self-supporting through sales. Each entry in the file is updated twice a year or as the need arises. The record of each entry is retrieved in a special update format and mailed to the agency for modification. See Exhibit IX-E. The response rate for returned update forms is approximately 90-95%; non-respondents are pursued by telephone.

The project staff consider the subject scope of the file to be very good. Its currency is also felt to be very high in normal times; but during work on the Directory updating has lagged. The information on each resource, staff say, is complete, within the limits that the computer programming allows. However, the lack of any type of back-up file (brochures, pamphlets, newsletters, etc.) does not allow the CIP staff to augment the information held by the computer for a given client. While the keyword indexing of the file was thought to be good, the addition of access via the Human Services Classification System was seen as an appreciable improvement. In terms of format, the arrangement and physical format of the file -- on-line -- were considered excellent.

Librarians in seven of the 12 branches in SMCL were interviewed. Each branch has developed its own file of local community information in addition to "Inforama" and the CIP file. The local files were affectionately referred to as "Shoe box," "resource," "information," or "query" files. While they vary in size, content and depth of information, they all contain local information found to be helpful to patrons. In actuality, these files are of the type that many librarians, especially reference librarians, have always maintained.

In relative terms of population served, three of the seven branches could be categorized as large, two as medium-sized and three as small. The three small branches do not have teletypewriters and would refer any human services question to SMCL central branch. However, each of the three has its own local information file. The files of these three libraries usually contain fewer than 100 entries; they may be on cards or looseleaf sheets in a folder. Entries may be listings of churches, government offices, courses, unique for-profit organizations, as well as ready reference information. See Exhibit IX-F.

One of the medium-sized libraries has an information file that contains I&R and query information. For example, under "autism" are listed both a service agency and books with related information; and the file also holds answers to such questions as "How do I make apple cider?" This same library also has a folder of community services. Arranged by subject, the folder contains brochures, newsletters and other ephemera related to community resources and activities.

The large branches have rather extensive information files; one contains 1800 entires. The staff at the two largest libraries estimate there to be about 10% overlap among local files, CIP and Inforama, with the overlap occurring on resources of local importance. The teletype machine by which most SMCL libraries gain direct access to the CIP file is out of the public area, requires time to

PENINSULA LIBRARY SYSTEM (10000)
COMMUNITY INFORMATION PROJECT (C.I.P.)
274 W. 20TH AVE.
SAN MATEO 94403

PHONE(S)
573-2061

HOURS
MONDAY-FRIDAY, 9 AM - 5 PM

PERSON IN CHARGE
CAROL YAMAMOTO

TITLE
PROJECT DIRECTOR

SOURCE OF FUNDS
COUNTY GENERAL REVENUE SHARING, PENINSULA LIBRARY SYSTEM, AREA AGENCY ON AGING

FEES
NONE

FOREIGN LANGUAGES SPOKEN
_____

HOURS SPOKEN
_____

AREA SERVED
ENTIRE COUNTY

PERSON TO CONTACT
CAROL YAMAMOTO OR JACKIE TRABICH

TRANSPORTATION
SAMTRANS bus stops within _____ blocks.

DATE ADDED
04/06/78

DATE UPDATED
01/01/80

SERVICES
HAS DEVELOPED A COMPUTERIZED FILE OF INFORMATION ABOUT HUMAN SERVICES WHICH ARE AVAILABLE TO SAN MATEO COUNTY RESIDENTS. THE INFORMATION IS AVAILABLE TO THE GENERAL PUBLIC DURING ALL HOURS FROM 18 LIBRARIES THROUGHOUT THE COUNTY. (THE LIBRARIES ARE DESCRIBED SEPARATELY IN THIS FILE.) EACH TIME A REQUEST IS RECEIVED, A REFERENCE LIBRARIAN SEARCHES THE FILE OF MORE THAN 1200 SERVICES TO RETRIEVE ONLY THE MOST APPROPRIATE SERVICES.

HUMAN SERVICE PROFESSIONALS, PARA PROFESSIONALS AND VOLUNTEERS WHO NEED RESOURCE INFORMATION TO RESPOND TO THEIR CLIENTS' NEEDS OR TO OBTAIN AN EXTENSIVE LISTING FOR INVENTORY OR PLANNING PURPOSES MAY CALL THE PROJECT OFFICE OR THE RESOURCE STAFF OF THE DEPARTMENT OF PUBLIC HEALTH AND WELFARE SOCIAL SERVICE DIVISION. ARRANGEMENTS TO OBTAIN SPECIAL PRINTOUTS OF A PARTICULAR TYPE OF SERVICE OR OF AGENCIES SERVING A GIVEN AREA MAY BE MADE WITH THE PROJECT STAFF OR THE RESOURCE STAFF.

RESOURCES LISTED IN THE FILE ENCOMPASS ALL OF THE HUMAN SERVICES, INCLUDING BUT NOT LIMITED TO: LEGAL AID, SENIOR CITIZEN CLUBS, ALCOHOL ABUSE PROGRAMS, CONSUMER PROTECTION, FAMILY COUNSELING, AND RESIDENTIAL CARE FACILITIES. AGENCIES INCLUDED ARE PRIMARILY PUBLIC AND PRIVATE/NON-PROFIT. THE FILE IS CONSTANTLY GROWING AND IS EXPECTED EVENTUALLY TO INCLUDE 1500 SERVICES. SUGGESTIONS FOR ADDING NEW SERVICES TO THE FILE ARE ALWAYS WELCOME.

Please add any additional information which is not included in our printout for your program, especially in the following areas:

Exhibit IX-E. Example of Output in Update Format. San Mateo County.

Additional eligibility requirements
Special application procedures
Program caseload
Is there usually a waiting list? If so, how long?
Counseling or support groups, membership meetings, or
regularly scheduled public meetings: open to whom, when, where?
Can you provide services to homebound?
Is your location accessible to the physically handicapped?
Staffing, including volunteers
Target populations served
Do you have a newsletter?
If you are a county agency, what is your pony number?

ALCOHOLISM

ALCHOLICS PROGRAM 355-8787, 100 Santa Rosa Ave, pac. treatment center for alcoholics and their families. july 1974- joint funding. non-profit corporation, Pyramid Alternatives, chaired by Youth Service Bureau, including Sid Lorvan on Board.funding approved by three county agencies plus Board of Sup. Offers counseling twice a week. Fees on sliding scale. hours: 2-10pm, tues-friday, late aft and early eve sat and sunday. Ann Golder in charge assisted by Pat Little and Larry Bartlett. funded for 1 year (county grant of $67,000,(believe that is federal, plus $18,000 from county) cover from D.C. to IMB

ALCOHOLISM

Alanon group (for the friends and relatives of alcoholics) meets every friday from 8:30 - 10pm at the Holy Cross Lutheran Church, 1165 Seville drive. no fees or dues.
2/77

DENTISTS

Toll-free referrals to dentists who work evenings & weekends: 800-772-2525

10/79

Exhibit IX-F. Examples from Local Information Files, San Mateo.

CRYONICS

Bay Area Cryonics Inc.
123 Bay Place, Oakland 94607
763-6647

Freezes bodies indefinitely. Cost: about $50,000. Available to public. Arrangements must be made in advance of death. Will also freeze brain only, if desired, cost of which varies.

10/79

JOB TRAINING

San Mateo Training & Employment Center
800 S. Claremont, San Mateo 94402
348-5373

Provides training for variety of jobs. Trainees can receive $348.00 per month (tax free) during classroom training, or at least $4.00/hr for on-the-job training. Jobs include machinist, laniscaper, printer, office machine repair, electronics, solar technician, more.

10/79

IMMIGRATION

International Institute
6794 Mission St
Daly City

992-1613, M-F 8-5

Provides help for any need specifically related to immigration. Works with immigrants from all over the world. Provides immigration counseling, assistance with forms and regulations, referral to language & citizenship classes, more.

10/79

Exhibit IX-F. Examples from Local Information Files, San Mateo (cont.).

log on and is noisy. All of the staff in libraries with teletypewriters identified the same problems in using the machine, but nonetheless expressed broad satisfaction with the format of the CIP file. One person stated that if the machine were in the public area, librarians would use it -- even given the noise -- because the results were always good.

E. SERVICE DELIVERY

Staff in the branches of SMCL claim that the local information files are more responsive to the needs of their clients than are CIP and Inforama. This feeling seems to be verified by the proportional use of the files: 92% of all I&R-type queries are answered from the local information file, according to the transaction survey. CIP and Inforama, of course, are used to some extent, as are published directories such as the Yellow Pages and federal and local government directories. Data from the transaction survey indicate that the CIP file or the CIP office staff are used to answer queries 5% of the time.

In addition to using CIP directly, the library staff may direct clients to local Resource Centers which, in turn, may use the CIP file or office staff to answer queries. There are no data to indicate how often librarians refer clients to these local Resource Centers or how often the Centers use CIP. Further, there are no data on the indirect uses of CIP by other service centers and I&R outlets in the County (estimated by the CIP Director to total about 100).

The relationship between the CIP and the various organizations that use it is illustrated in Exhibit IX-G. Solid lines link those organizations that have direct access to the CIP computerized file.

The CIP staff and the Resource staff began a monthly I&R forum in 1978. Included in these meetings are any agencies that provide I&R as one of their services or as their only service. The CIP Director views the forum as an important channel through which members are informed about new agencies and discuss issues that could affect I&R (for example, funding alternatives.) It also provides political visibility for CIP and, indirectly, for the libraries.

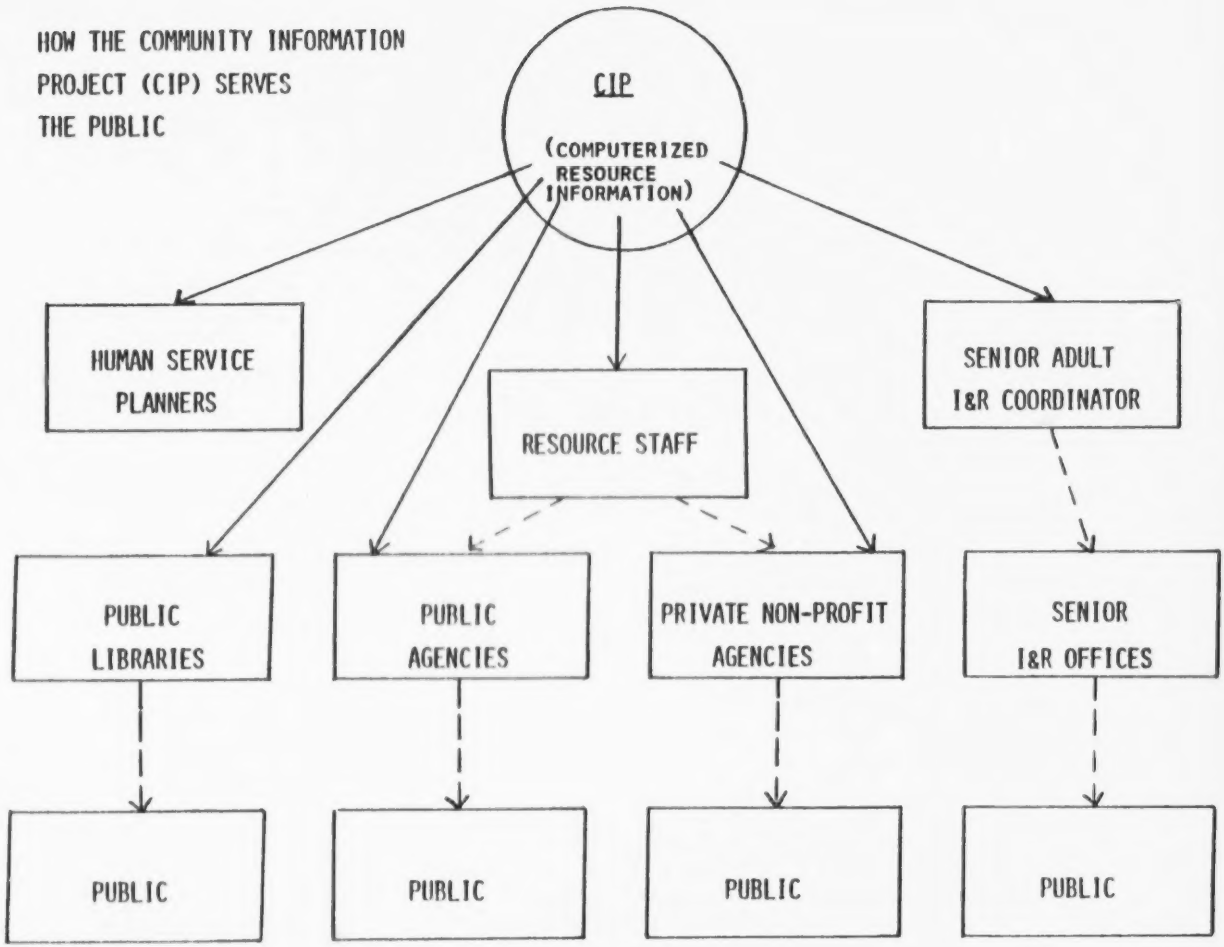


Exhibit IX-G. "How the Community Information Project Serves the Public," San Mateo.

F. EXTERNAL RELATIONS

At the outset, a CIP Advisory Committee consisting of the San Mateo County Librarian, a representative from one independent public library, and the PLS Reference Coordinator was appointed by the PLS Board. Also serving in an advisory capacity to CIP was an Information and Referral Services Advisory Committee which included several representatives of human services organization. There was no "grass roots" advisory group.

The resource agencies in the County have been cooperative in providing information for the file, as evidenced by the return rate for the "updating" questionnaires. This cooperation might be expected as a result of the interorganizational involvement in I&R through the Information Consortium, the I&R Services Advisory Committee and the current I&R Forum.

Currently there are weekly meetings of the CIP Director, Resource Staff and Senior Adult I&R Coordinator; the Inforama Committee continues to meet.

G. ADMINISTRATION

In general terms, information and referral in the branches of San Mateo County Library does not have a discreet place on the organization chart. The provision of I&R-type information is not viewed as distinct from any other information service, except when use of or referral to CIP is involved. The Community Information Project is a special project of the Peninsula Library System, a special cooperative organization of eight autonomous libraries in San Mateo County. In essence, CIP is a special project of a special project. While it has direct links to the member libraries, the CIP Director answers only to the Director of PLS. The staff of CIP consist of a director who has a social service background and stated government experience, a part-time professional librarian, a part-time clerk and part-time clerical worker as they are available through the Comprehensive Education and Training Act. These people perform all of the support activities necessary to keep CIP operational. Although some of the CIP direct service to clients is delivered by the branch and central branch libraries, and some is provided by the Resource Staff, the bulk of CIP service comes from the local Resource Centers. Originally all SMCL staff were to receive orientation and training on the use of CIP; however, the funding and staffing problems of the past few years have thwarted these ambitions. Training of staff at the onset of the Project did occur, as described in Section B. However, there was a two-year interim in formal training and only recently has it been resumed as a series of CIP workshops for staff of all PLS libraries.

COSTS

The original 1974-76 LSCA grant provided for $83,000; a 1976-77 extension added an additional $30,000. All elements of set-up and the first year's service -- staff, equipment, supplies, publicity -- came from these grants. Funds for CIP for fiscal year 1980 amount to $69,119 and derive primarily from a County Revenue Sharing contract. Other sources include Title III of the Older Americans Act and the Peninsula Library System. The Department of Public Health and Welfare pays for the computer charges associated with the Resource Staff.

PUBLICITY

Initial publicity consisted of radio and television public service announcements in Spanish and English, radio and TV spots and ads, brochures to schools and speaking engagements by the CIP staff. A slide-tape on CIP was also made available to the public. Within libraries were flyers and signs announcing CIP. Ongoing publicty has been fundamentally the same. All publicity, with the exception of media spots in Spanish, have been aimed at the general public. The most effective form of publicty, according to staff, is the public service announcements. It is estimated that about $500 per year is spent on current publicity.

H. I&R IN THE CONTEXT OF OTHER SERVICES

The staff of SMCL view I&R as being not different from reference, but another way to provide information to the patron. One staff member stated, "You give information, not value judgments. You provide a resource and hope it will help." Interestingly, the majority of staff felt that, while I&R is a natural component of full reference service, the limitations on their time and the hindrance of using noisy back-room machinery to tap the CIP file make it sensible to direct clients to the people most skilled in using the CIP file (the CIP office staff and the Resource Staff), rather than use CIP directly for the client.

The top management of SMCL feel that I&R has a place in public libraries, but that librarians should not act in a counselling or advisory capacity. SMCL's director also stated that Proposition 13 continues to have a deleterious effect on morale and staff time and therefore on the amount of attention the staff give to anything other than established services. However, it was also claimed that morale is improving and as a result attention to I&R will also. Currently I&R could not be considered a high service priority of SMCL, nor a threat to the dominance of traditional, established services in the Library.

I. EVALUATION

The library keeps a tally of "reference transactions," consisting of all information transactions excluding directional ones. In fiscal year 1978, reference transactions numbered about 157,000; in fiscal year they totalled about 86,000; and in fiscal year 1980, about 96,000. The decrease seems to be directly related to the advent of Proposition 13 and subsequent reductions in hours open and the availability of staff to answer queries. There is no reason to believe that the need of the client group has diminished during this period.

The CIP office tallies all searches of the computerized file (including those done by PLS librarians and other remote searchers), total file records printed out and total mailing labels printed. For January-February 1979, the statistics were as follows:

. searches	
CIP and PLS libraries	230
Resource Staff	454
	684
. records printed	
CIP and PLS libraries	17,374
Resource Staff	33,455
	50,829
. label requests to CIP office	10,377

As the numbers show, relatively few searches (684) account for many resource entries being listed (50,829). Searches tend to result in long lists of resources rather than a few selected responses.

The Resource Staff, with their own computer terminal -- not teletypewriter -- transact the majority of business with the file. The need for information and referral by the San Mateo County citizenry can be seen in the large number of organizations providing I&R. The need for the CIP office and file is demonstrated in the fact that the Resource Staff and the Senior Adult I&R Coordinator (who is mandated to have a file) have designated CIP as their official file. Furthermore, the 1978-79 County Grand Jury, which annually evaluates County services recommended (1) that any organization needing in-depth information on the structure and funding of County Departments contact CIP and (2) that funding for CIP be maintained so that its usefulness and effectiveness would not be reduced.

The staff of the library consider the major weakness in using CIP in the libraries to be the noisy teletypewriters located in the "backroom" where a librarian must leave the public area to use it. Lack of training and lack of experience, jointly and separately, also appear to be barriers to the libraries' direct use of the CIP file. The SMCL and CIP directors stated that library staff would profit from training in deciding when to access the CIP file on the client's behalf and when to direct the client to the CIP office or to the local Resource

Centers. The immediate priority of the Library, however, is to offset the present and anticipated future impact of Proposition 13 on traditional services. While I&R is professed to be a library priority, it appears not to be high on the list of service priorities, nor -- as was pointed out above -- is it likely to displace any existing services in SMCL in the near future.

TRANSACTION SURVEY

All I&R clients were interviewed by library staff between mid-March and mid-June 1980 at all branches of SMCL. Three-hundred and ninety-three (393) interviews were completed. The frequencies for the responses to each question are displayed in Exhibit IX-H. Following are some of the most striking findings:

- Almost half of the I&R clients claim to learn of the I&R service from library staff; relatively few are referred to the library by an agency; and fewer than 2% learn of the service through the print or broadcast media
- The proportion of men asking I&R queries is higher in the Peninsula System than at any other site (47%)
- Over half of the I&R inquiries are brought to the library in person rather than being phoned in
- The staff provide complex information-giving in response to almost 1/4 of the I&R queries
- The resource file that each library maintains on its own is used in answering 92% of the queries. CIP is used 5% of the time; Inforama, 2%.

Cross-tabulations were run on many of the variables of the transaction survey. The cross-tabulations which proved to be statistically significant at the .05 level or better when subjected to the chi-square test and which contribute to explaining patterns in the I&R service are presented below:

- A call from an agency is more likely to result in an actual referral by library staff than is a call from an unaffliated citizen
- The library staff are slightly more likely to use the CIP file (1) for calls from agencies, as opposed to other calls, and (2) for queries that have been posed elsewhere first
- Users who learn of the I&R service from a friend, neighbor or relative tend to be the less regular users of the library; those who learn of the service from library staff tend to be the more frequent users
- There is a tendency with those with lower levels of education to learn of the service from a friend, neighbor or relative. The youngest age group and older people tend to learn of the service from library staff disproportionally more than other age groups
- Health queries are more likely to come from women; recreation and sports from men; and neighborhood, from agencies
- In-person queries are more likely to come from younger people and from those with incomes in the lowest income group

5 Agency call (answer only questions 9-12) #: 393

__ No response (answer no questions)

PUBLIC LIBRARY INFORMATION AND REFERRAL PROJECT

Branch _____
Date _____
Time _____

We're trying to improve our service. Would you help us by answering a few questions? We won't record your name and it should take only one minute.

1. Have you used the library's information service before — the one you're using now? #: 393

   [66] Yes [31] No [2] Don't know

2. Have you used any other service of this library system? #: 371

   [69] Yes [31] No [4] Don't know

   IF YES: #: 226

   [66] Was it within past 3 months?
   [23] Was it within past year?
   [10] Was it longer ago? (Or don't remember)

3. How did you learn of the library's information service?

   [21] Friend, neighbor, relative #: 367
   [44] Library staff #: 368
   [4] Referred by an agency #: 369
   [2] Radio #: 362
   [1] Television #: 364
   [1] Newspaper #: 361
   [25] Other #: 362

4. Have you asked your question in any other places before coming to the library? (You don't have to name them.) #: 365

   [29] Yes [71] No

5. I'll read some age groups. Just stop me when you hear yours. [Interviewer: Omit obviously wrong groups when possible.] #: 372

   a[11] 13-19
   b[29] 20-35
   c[13] 36-45
   d[22] 46-64
   e[17] 65 or over
   [8] Declined to state

6. I'll read some groups based on years of education completed. Just tell me when you hear yours. #: 370

   a[33] College graduate
   b[36] Some college
   c[25] High school graduate
   d[2] Some high school
   e[3] 8th grade or less
   [1] Declined to state

7. In which of these groups did your total family income, from all sources, fall last year -- before taxes, that is? I'll read the groups. #: 362

   a[10] Up to $8,000
   b[19] $8,000 to $14,000
   c[14] $14,000 to $20,000
   d[11] $20,000 to $26,000
   e[12] Above $26,000
   [25] Declined to state/don't know

That's all the questions. Thank you very much for your help.

INTERVIEWER TO FILL OUT REMAINDER:

8. Sex of patron #: 371

   [47] Male [53] Female

9. Mode of inquiry #: 358

   [44] Telephone [56] Visit [1] Both checked

10. Topic of question (check all that apply) #: 393

    [16] Money matters
    [3] Consumer issues
    [6] Housing/hshld. maint.
    [9] Health
    [11] Job-related issues
    [3] Transportation
    [12] Education
    [13] Neighborhood issues
    [7] Recreation, sports
    [2] Family relations
    [2] Crime & safety
    [11] Legal matters
    [4] Child care
    [12] Other

11. Disposition of question (All that apply) #: 339

    [92] Information was given
    [28] Information was given after interview to probe underlying need
    [10] Librarian contacted a resource on patron's behalf
    [2] Other (Specify)

12. Was question answered (or referral made) from #: 382

    [5] CIP (or memory of)
    [92] Local library resource file (or memory of)
    [2] Inforama
    [2] Other

Exhibit IX-H. Survey results, San Mateo.

Day of the Week: n=393

Sun	0	Thurs	12
Mon	23	Fri	9
Tues	24	Sat	10
Wed	20		

Typology of Education and Income: n=276

low educ, low income	5
low educ, hi income	8
hi educ, low income	32
hi educ, hi income	55

Exhibit IX-H. Survey results, San Mateo (cont.).

- Job-related queries are mosre likely to be presented in person and by someone in the 13-35 age group
- People posing consumer-related queries are more likely than others to have asked elsewhere first; they are also more likely to receive a response other than simple information-giving
- Complex information-giving is more likely to be provided on topics of housing/household maintenance queries than on other topics
- The topic of education is more likely than other topics (1) to be presented by a younger client, and (2) to receive a response from the local library's own home-made resource file
- The neighborhood topic is more likely than others to result in a referral by library staff
- The youngest and oldest clients tend to ask a greater proportion of recreation and sports queries than clients in the middle age groups. This topic also tends to generate a greater proportion of queries from among people with eight or fewer years of completed education
- Legal queries tend to be posed by people older than 35, and tend not to have been posed elsewhere before, and tend to receive complex information-giving as a response

When correlated, the Typology and the variables of the study generated few significant results. The one that seems to help in explaining patterns of I&R service indicates that people in the Low Education-High Income category, followed by Low Education-Low Income category, are more likely to receive referral from the library staff than people in other categories.

ENDNOTES

1. California, Department of Finance, California Statistical Abstract, 1979; California, State Employment Development Department, Annual Planning Information: SF-Oakland SMSA, San Mateo County, 1980-81; U.S. Department of Commerce, Bureau of the Census, United States Census of Population: 1970, Vol.1, Characteristics of the Population; and U.S. Department of Commerce, Bureau of the Census, County and City Data Book: A Statistical Abstract Supplement, 1977.

2. Seidel, Alison P. "The Peninsula Library System's Inforama: a Directory of Community Resources," California Librarian 37 (July 1976): 18-21.

3. Irby, Jane. "A Computerized Approach to I&R File Management," California Librarian 37 (July 1976): 22-23.

4. California State Library. "Peninsula Library System Outreach Program - Computerized Community Information Project: A Proposal." Sacramento: California State Library, January, 1974.

5. California State Library. "Peninsula Library System, Computerized Community Information Project: A Proposal." Sacramento: California State Library, August 1976.

6. "California Voters Approve Proposition 13," Taxes: The Tax Magazine 56 (July 1978): 426.

7. San Mateo County, CA. Civil Grand Jury Final Report, 1978-1979.

CHAPTER X

CAROLINE COUNTY

A. THE SITE

THE COUNTY

> Maryland is a rapidly urbanizing state with 80% of its population concentrated in either the Baltimore or Washington areas. It has often been called America in Miniature because of its varied terrain. Its geography includes the Appalachian Mountains and miles of coastal shorelines. While its economic base includes a number of federal installations and heavy industries, it also contains a significant number of farms producing crops ranging from soybeans to tobacco. Maryland's Eastern Shore, located east of the Chesapeake Bay, is a unique area of the state. It is bounded on the east by the Atlantic Ocean and Delaware, on the south by Virginia, on the north by Cecil County, and on the west by the Chesapeake Bay. Consisting of eight Maryland counties..., the Eastern Shore contains approximately 3,373 square miles of land and water.[1]

Caroline County is located 61 miles from Baltimore and 75 miles from Washington, D.C. The population is projected to be 23,400 in 1980, with 13% of those over 65 years old. The income of the average household (1977) is $11,082 (compared with $18,672 for Maryland and $17,327 for the nation.) Per capita income is $4,039 ($6,255 state-wide; $5,986 for the U.S.) Forty-three percent of the households have a disposable income of less than $8,000 (compared with 21% for Maryland and 28% for the nation.) It is one of the poor counties of Maryland. The median years of education in 1970 was 10.2, well below the Maryland median of 12.1 and the U.S. median of 12.0. The population of the county is predominantly white, with a black population of approximately 20% and .2% "other."

The major employers in Caroline County are the federal, state and local governments, with an estimated total (1975) of 900 persons employed by all three. There is no other single large employer; the majority of people (over 60%) work in manufacturing, wholesale and retail trades, agriculture and transportation.[2]

THE LIBRARY

The Caroline County Public Library (CCPL), whose Central Library is located in Denton, was founded in 1961. It is a consolidated library system, with no autonomous units. There is one branch in Federalsburg and one bookmobile. The Library has a staff of nine, including two professional librarians. The Library has 38,586 volumes, 150 periodical subscriptions and operated on an annual budget of $151,000 in 1978-79. CCPL is governed by a board of trustees appointed by the County Commissioners.

B. ORIGINS OF I&R

In 1973 the Maryland Department of State Planning conducted the Multi-Service Center Study to evaluate the delivery of services by Maryland's state agencies. The results of the study showed that citizens most needed information about local events and resources and that they expected this information to be available from local public libraries. Influenced by other studies[3] dealing with the need for information in rural areas, the Maryland State Department of Education, Division of Library Development Services, in 1974 appointed a Specialist in Information and Referral to develop I&R programs in public libraries throughout the state. By 1977, 13 public library systems had developed I&R services.

In 1975 the Division of Library Development and Services received a U.S. Department of Health, Education and Welfare (HEW) grant, funded under the Higher Education Act, Title II-B, Library Research and Demonstration, to demonstrate the provision of I&R through public libraries to residents of a three-county rural area -- Dorchester, Wicomico, Worcester -- on Maryland's Eastern Shore. Funding for the first year (October 1975 - October 1976) was $61,400. The major amount ($45,300) was spent on personnel. In the second year (July 1976 - July 1977), when Caroline County replaced Worcester as a demonstration site, the budget was $66,300. Again, the major expense ($48,000) was personnel. I&R staff, all natives of the Eastern Shore, for the first two years, were one project coordinator for all three counties, one secretary, and three community aides (one for each county.) The goals for the first year of the project were as follows:

- Provide access to cultural, educational and recreational information needed by the citizens of Dorcester, Wicomico and Worcester counties
- Train a corps of library staff to provide I&R
- Raise the residents' expectations of the public libraries' information-providing function
- Enable the libraries to determine residents' needs for information and services through the questions asked of an I&R service
- Transmit these needs to the appropriate agency or organization
- Provide a model for rural I&R in the United States

In the second year the objectives were to continue and to strengthen the previous objectives; to expand the resource file to include consumer information; and to establish communication and cooperation among the three public libraries and the state agencies that provide consumer information and services.

The three-county I&R coordinator had a master's degree in library science; the other four employees had no previous library training or experience. A large part of the initial training was directed to clarifying the library's

function in reference and readers' advisory services as well as in I&R. Workshops were held on Adult Readers' Advisory Services, Children's Services, and Reference Techniques. Emphasis was also placed on the project staff's integration with and acceptance by the regular library staff.

In the second year of the HEW-funded project Caroline County replaced Worcester County. The Community Aide for CCPL had a professional library degree and experience at Dorcester and Caroline County libraries. Her background was judged to preclude formal orientation of the general library staff to I&R and provide for the smooth transition of CCPL into the project.

CCPL began collecting information for its file in November 1976. In April 1977, one year after the other project libraries, the staff began using the file to answer I&R queries from the public.

When the three-county grant ended in July 1977, CCPL absorbed the salary of the community aide (who also became the Head of Reference.) Realizing that the I&R service could benefit agencies in the county, CCPL applied to the State for, and received, a Library Services and Construction Act, Title I grant of $23,000 for fiscal year 1980. The purpose of the award was to enable "The Extension of Library Information Services to Civic Organizations in Caroline County." The goals were to:

- Develop a clearinghouse for cultural and educational information related to local organizations
- Extend information services to community agencies and promote agency referrals to the library
- Address the information needs of the aging and handicapped and assist agencies serving these clients with library or agency programming
- Visit the agribusiness community to promote use of the library's information services

The LSCA grant provided for an information specialist and a secretary. The head of reference, the former "community aide", acted as coordinator for this last funded era of I&R in Caroline County.

C. I&R SERVICE CONCEPT

The target group for Caroline County under the HEW funding was the general population. Under the LSCA funding sub-targets have been identified: the aging, the mentally and physically handicapped, and agriculture-related organizations -- in addition to the general population.

Currently at CCPL I&R is integrated into regular reference work; a copy of the file is at the reference desk, and the same staff provide both I&R and reference services. Simple information-giving and complex information-giving are provided by all staff as a regular service. Some staff may do referral and advise the client on a strategy to use in obtaining needed services. Follow-up and advocacy are done informally, if at all. ("It's a small community; you know when people have been helped.") Counselling, evaluation of resources, transportation and escort are not provided. The file is available for use by agencies at no cost, as it is available to individuals. On occasion new agencies have used the file to establish first contacts with relevant groups and organizations in the community.

Information that is gathered in the process of providing I&R service -- such as the range of topics inquired about -- is regularly but informally transmitted to local officials, planners and human service workers. To date, the file has not been used by library staff for non-I&R activities, such as program planning.

One of the major accomplishments under LSCA funding was the establishment of a community calendar in the library. It consists of a large corkboard listing classes, seminars, trips, shows, organizational meetings, and special events of interest to residents. The calendar is intended to be used by agencies and organizations to schedule and publicize their events and by patrons to find out what is happening locally. The calendar does not list regular club meetings; these are listed in the I&R file. A back-up file is maintained for the calendar. This gives additional information about activities listed on the calendar as well as information about activities which may not be listed.

Pursuant to gathering information related to agri-business in the County and agricultural resources at the state and federal level, the library plans to publish an "Agri-Directory of Caroline County," a pamphlet containing information on agriculture-related agencies, Ruritan clubs, agriculture-related businesses and the agricultural information available at the library.

A patron may access the I&R file in person, by telephone, and by mail. There is no dedicated phone line or three-way phone hook-up for I&R service. However, during the three-county project, an extra line was added to the then existing two, and three lines remain to this day. The public may also use the file directly, without assistance. This use of the file is encouraged; however,

assistance is offered in order to keep an accurate account of I&R queries. I&R is available during all regular hours of the Central Library: 9 to 9 on Mondays and Fridays and 9 to 5:30 on other weekdays and Saturdays. However, the information specialist is available only from 9 to 5, Monday through Friday. The I&R service is located in the main library in Denton. There is one copy of the file at the reference desk and one copy in the information specialist's office. CCPL's one branch in Federalsburg has no copy of the file and refers any I&R queries to the Central library.

D. THE RESOURCE FILE

Although CCPL joined the three-county project in its second year, CCPL adopted the first year's objectives, which focussed on collecting information for the file. The community aide worked alone from November 1976 through September 1977 to assemble the information. The staff began using the file to answer questions in April 1977. About that time the file contained more than 600 resource entries. The aide collected from the I&R files in the libraries of Talbot, Kent, and Queen Anne's counties information about services that were available to Caroline County residents. Also made available were the cards from the Dorcester and Wicomico county public libraries' I&R files. The Maryland Manual was used to identify state services and information on these services was taken from the Manual directly.

The main file is arranged alphabetically by service provider. The format of the file, 5 x 8 index cards, was patterned after Baltimore County Public Library's. The subject headings list was also drawn from BCPL. The subject index, also on 5 x 8 cards, is separate from the resource file. Whereas the index names each resource appropriate to a particular subject, full information about the resource is found in the main file. There is a limited amount of cross-referencing in the main file and index. Currently the resource file contains about 925 entries; the subject index, about 530. Information for the file is gathered not only from Caroline County but also from Baltimore, Annapolis and other jurisdictions with services that would be useful to and usable by Caroline County residents. New resources to be added to the file are identified through the newspaper and by word of mouth, as would be expected in a small community. Information is collected from these resources through in-person interviews for county agencies and via telephone for agencies outside the county. A resource file card is used to record the necessary information. A letter and a copy of the file card are sent to all resources on file once a year, for updating. In the original grant, only the telephone number and the contact person were checked, by telephone; it was assumed that the rest of the information remained the same. While updates usually are initiated by the library, often a resource will call to volunteer new information. Exhibit X-A is an example of a file card and the updating request form. Reflecting upon the dispersity of residents and services in this rural area, the director felt that a regional (pan-county) approach to updating I&R regularly would be appropriate. The kinds of resources included in the file are:

- churches
- clubs/associations
- entertainment/recreational organizations and events
- for-profit organizations that are not competetive and not listed in the phone book
- non-profit organizations (government, service and other)
- civic organizations
- service agencies

CAROLINE COUNTY PUBLIC LIBRARY

100 MARKET STREET • DENTON, MARYLAND 21629

Dear Sir:

The Information and Referral Service at the Caroline County Public Library maintains a file of public and community services and activities which are beneficial to the citizens of our community. In order to have accurate information for our library patrons, we periodically update information in our files.

Enclosed with this letter, you will find our file card which contains information about your agency, activity, or service. Would you be kind enough to cross out any information on the enclosed card which is outdated or which is no longer accurate? Please add corrections or new information to the card in ink and return it to the Caroline County Public Library.

Thank you for your assistance.

Sincerely,

Penny Davish

Penny Davish
Information & Referral Specialist

CAROLINE COUNTY COMMITTEE FOR PROMOTION
of EMPLOYMENT and PROGRAMS for the
HANDICAPPED
c/o Carolyn G. Shull
RD 3, Box 94
Denton, Maryland 21629

TYPE OF AGENCY/ORGANIZATION:
State
County
Community
Private, non-profit

PARENT ORGANIZATION: Governor's Committee on Employment for the Disabled
PERSON IN CHARGE: Carolyn G. Shull — TITLE: Chairperson
CONTACT PERSON(S): Same — PHONE: 479-0212

SERVICE DESCRIPTION: The purpose of this Committee is to increase the awareness of problems facing the handicapped and they are available to speak on these problems. The Committee is active in field research on Caroline County's Architectural Barriers Study for the handicapped and they have information for businesses on parking signs for the handicapped. Staff characteristics: Volunteers are needed to serve on the committee and ideas are welcome for the handicapped on anything that average people do, i.e. food preparation, homemaking, clothing, etc.

DAYS & HOURS: Meeting held, 2nd Wednesday of each month
ELIGIBILITY: must have interest in helping handicapped lead a more fulfilling life
OBTAINING SERVICE: Contact above
FEES: none

AREA SERVED: Caroline County
UPDATE: yearly
Interview 8/30/79

Exhibit X-A. Update Form. Caroline County.

Each resource card contains the following information:

- Name, address and phone number of the resource
- Goal or purpose of resource agency
- Description of services or activities
- Name and title of person to contact
- Name and title of person in charge
- Type of service (federal, state, local, private)
- Source of financial support
- Hours of service
- Geographic area served
- Eligibility requirements
- Physical accessibility of the agency (ramps, parking, public transportation)
- Meetings of or sponsored by the agency
- Methods of obtaining service
- Speakers available
- Published materials available
- Terms of office and frequency of rotation of officers
- Board members
- Use of volunteers
- Date of last update
- Subject headings and "see also" references

The staff generally see the subject scope of the file as very good, but the information specialist expressed the need for more entries to be added to the file. The currency of the file was rated to be as good as it could be considering the time lag involved in updating. The depth of information on resources was considered to be very good except for very large agencies where space constraints on the card limited the amount of information. The arrangement of the main file alphabetically by service provider was rated as quite satisfactory. The adequacy of access -- the subject index -- was felt to be good, although one staff member felt that the headings were too broad. The staff agreed that the physical format of the file, 5 x 8 index cards, was adequate for their needs.

E. I&R SERVICE DELIVERY

The public access the library's I&R service by telephone or in person. The person staffing the reference desk is responsible for handling all queries -- both reference and I&R.

In addition to the resource file, the staff uses the following in answering I&R queries:

- Yellow Pages (CCPL has these for major areas in the U.S.)
- Maryland Manual
- Washington Information Directory (for federal information)
- Legal Referral File (developed by the Bar Association with the library's cooperation, administered by the library)
- Other reference materials which would complement the I&R file (e.g. Encyclopedia of Associations)

A copy of the card for new entries to the resource file is placed in a "new card notebook" kept at the reference desk. The staff becomes familiar with these new entries before they are added to the file.

The staff uses a "reference card" to record reference and I&R queries. The staff tend to respond to an I&R query by giving a number of resources that could provide the needed information or service. They try to help the client narrow the choices to those that past experience has shown to be most helpful. One staff member stated that we "don't try to tell the clients all we know, just the information they need." The staff may also transfer the client to the information specialist if the client wants more information than is in the file or if the staff member is unsure of the resources the client is seeking.

When CCPL was involved in the three-county project, there were regular meetings between the project coordinator and the community aides, individually and jointly; and the counties involved had access to each other's resource files. Exchanges of resource information among libraries in the region in and around Caroline County continue to occur. However, since the termination of State funding, formal State oversight of the I&R activities in CCPL has stopped. At the present time there are no formal links of CCPL I&R activities in other libraries.

F. EXTERNAL RELATIONS

Under hEW funding, interagency councils of social agencies were designated as the advisory boards for their respective county libraries In the second year of the project, when Caroline County joined, its interagency council was inactive; thus there has never been a formal citizen involvement in I&R policy.

When the initial file development was completed in Caroline County and I&R service began (April 1977), the community aide began to do "drop-ins" -- regularly scheduled visits to components of the local informal information networks (firemen, ministers, policemen etc.) Drop-ins were designed to give the community aide contact with individuals in the community whom residents tended to use for information -- community "gatekeepers." During these visits I&R was explained, brochures were left, and arrangements were made for a follow-up visit. In pursuing the goals for the second project, 1979-1980, the staff has made contact with several community groups. For instance, a questionnaire on needed services for the aging and handicapped was distributed to appropriate agencies and organizations (see Exhibit X-B); and all agribusinesses in the County were visited in order to collect information about them and to promote the library's information services.

The project staffs, both those involved with the earlier three-county effort and those working on the second project, seem to have been active in contacting organizations in the community such as churches, clinics, banks, businesses and service clubs. The level of outreach activity appears to have established a spirit of cooperation between the library and the resources in Caroline County. Evidence of this goodwill can be found in the fact that Caroline County Commissioners designated CCPL as the information center for Caroline County, while Upper Shore Aging, Inc. and the Maryland State Office on Aging have designated CCPL as the official I&R resource for the aging in the County. There are no other I&R organizations in Caroline County in the sense of espousing I&R as a goal of the organization.

Exhibit X-B. I&R Questionnaire. Caroline County.

X - 12

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G. ADMINISTRATION

STAFF

During the period of HEW funding, the mechanics of I&R -- file development and update -- were separate from the library's other activities; thereafter they were integrated with regular library activities. During the first grant period, the community aide was responsible to the state project coordinator as well as to the library hierarchy. Thereafter, the community aide became head of reference at CCPL and spent only part of her time on the file. She became a regular library employee and was responsible to the central library management. At the beginning of the second funded project (July 1979), the project staff reported to the head of reference who was spending part of her time on I&R overseeing the project. Currently the library director of CCPL oversees the I&R activities. Refer to Exhibits X-C and X-D.

Nearly all staff answer I&R questions. Pages, maintenance staff and paraprofessionals do not. The rest are responsible for direct service; all back-up is done by designated project staff. None of the full-time project staff has a master's degree in library science. Two part-time staff members have an MSLS; they each work only about six hours a week.

The Caroline County community aide on the three-county project, later the project overseer (while still head of reference) for the LSCA grant resigned in November 1979. The library director then became overseer of the project. Moreover, CCPL has had two different information specialists on the second funded project. Fortunately, all those who have been involved seem to have been community-oriented people and mindful of the need for graceful transition from one "regime" to another. The changes in staff appear not to have hindered the fulfillment of the goals of the I&R service.

TRAINING

After the initial file development -- from April 1977 onward -- the staff were instructed in the structure and use of the file by the project coordinator and community aide, in a one-day session. This was followed by a series of question-and-answer sessions about the use of the file. I&R training for the project staff included five major topics:

- Information and referral services as delivered through a public library
- Organizations to be included in the file and techniques for interviewing them
- Communication skills
- Use of the file

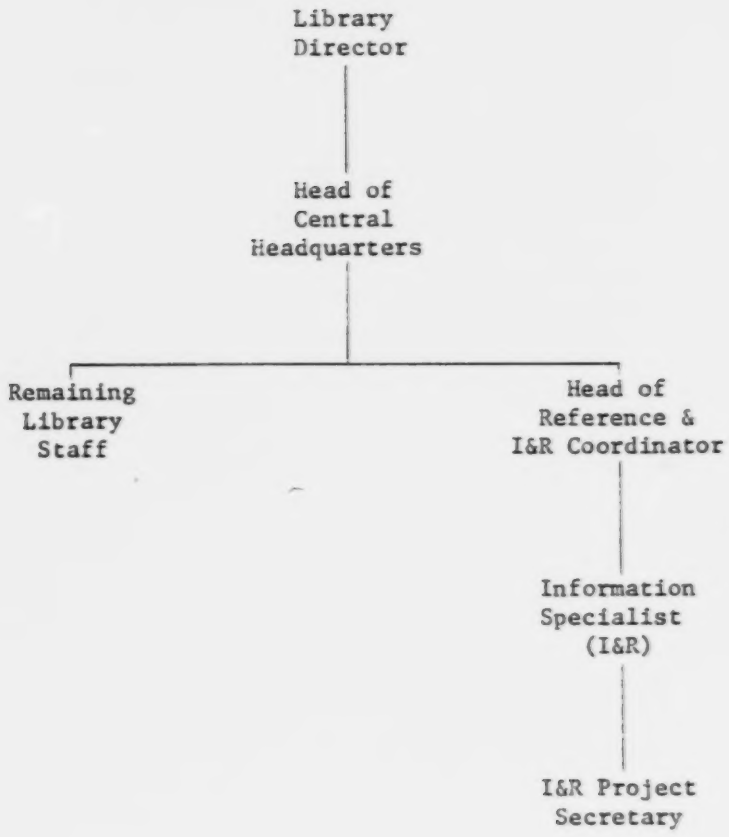


EXHIBIT X-C. I&R in the Library hierarchy prior to November, 1979, Caroline County.

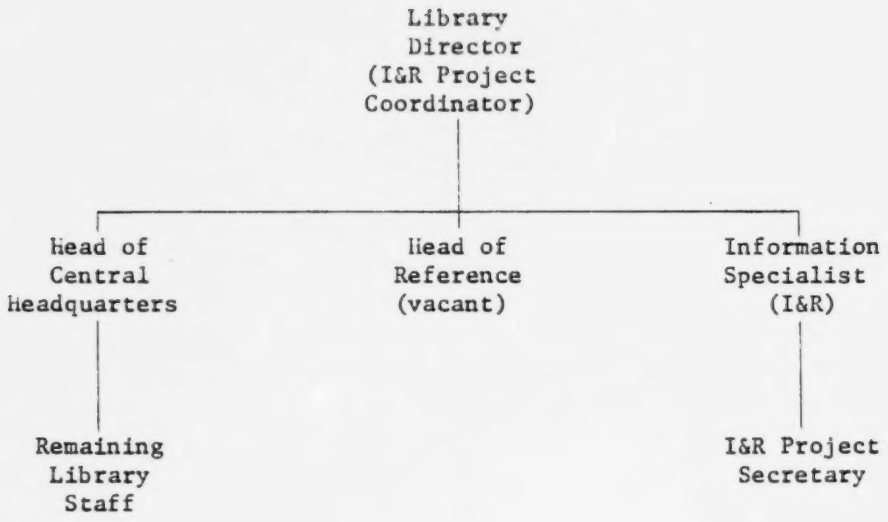


EXHIBIT X-D. I&R in the Library hierarchy currently, Caroline County.

. Conducting "drop-ins" -- that is, regularly scheduled visits to components of the local informal information network (merchants, firemen, ministers etc.) who are in daily contact with area residents

An orientation to I&R was provided for the general public staff of the library, stressing that:

. I&R is a natural extension of reference service
. The staff are already doing I&R on a limited basis, and a resource file would provide better coverage

Beyond this, the project staff provided individualized instruction in I&R to those who were interested. Despite attempts to train all of the public staff, it was clear to everyone from the beginning that any difficult I&R query would be referred to the community aide. In the course of interviewing it became obvious to the study team that most public service staff would welcome additional training in answering I&R-type queries and in using the subject heading list.

COSTS

(For three-county project funding under HEW, see Section B.)

During the year with the three-county project, CCPL received funding from HEW for the community aide's salary and in-kind support from Dorchester County in the form of 1/3 time of a HEW-funded secretary. Inasmuch as preparation for opening day consumed about six months, we could estimate that at least 1/2 of the year's cost for these two people -- one aide and 1/3 secretary -- was required for start-up.

The current LSCA funding ($23,000) paid for the information specialist and a secretary. These people, however, represented only part of the effort required to keep I&R going. Part of the time of all public service staff was devoted to providing I&R, as was part of the time of the library's director in overseeing it. Now, the end of LSCA funding, the I&R service is funded wholly out of regular revenue sources of the library.

PUBLICITY

During the three-county effort, "drop-ins" proved to be the most effective form of publicity. The people contacted during these visits were most cooperative and enthusiastic about the budding I&R service. A total of 662 drop-ins were conducted in all counties involved during the two years of the project. I&R was featured in newspapers, and all three counties had regular columns in their local newspapers, CCPL's column was entitled "Do You Know?" and now is called "Have A Question? Ask the Library." See Exhibit X - E. Also in Caroline County, the newspapers

Have a question?

Ask the library

The Caroline County Public Library may have the answer to your question., Visit or call us at; 479-1343 for information and local happenings.

QUESTION: How much are ice skating lessons at Hog Neck Arena?

ANSWER: The fee for Group Lessons is $20.00 per student for 5 one-half hour sessions. Private Lessons cost $6.50 for 30 minutes. Applications for Group Skating Lessons are available in the library. A new series of classes begins January 3, 4, 5, and 8, 1980. You may contact the arena at: 822-5644 or 822-7070. The Hog Neck Arena is a new ice skating rink located on Route 50 in Easton.

QUESTION: What is the second line of the song, "Hooray-for Hollywood"?

ANSWER: "That screwy ballyhooey Hollywood" is the second line of the song, by Richard A. Whiting and Johnny Mercer. The song was first performed in the 1937 movie, "Hollywood Hotel". This information was verified in the Hollywood Musical, by John Russell Taylor, 1971, page 123.

QUESTION: What is the address and phone number of the Better Business Bureau of San Antonio, Texas?

ANSWER: Better Business Bureau of San Antonio, Inc., 406 West Market Street, Suite 301, San Antonio, Texas 78205; telephone number: (512) 225-5333. This address, among other addresses of Better Business Bureaus can be found in the Consumer Complaint Guide 1979. This is a helpful and interesting book in our reference collection for consumers who need to know what to do and whom to contact when things go wrong. It includes a directory of consumer-related federal agencies, and, also, a company, product, and brand names directory.

Exhibit X-E. Newspaper Column, The County Record, January 9, 1980, page 16A, Caroline County.

featured interviews with the community aide. Television features and spots have been carried by the two cable stations in the area. The one commercial station that covers all three counties has presented editorials on the new service. Radio spots have been beamed over all local stations. Presently, CCPL's information specialist has a daily 10 minute feature on the local radio station to present and promote community calendar events.

The usual posters, brochures, flyers and telephone stickers were distributed both inside and outside the library as the service began, and publicity also came through unusual means: Flyers and brochures distributed by a hospital, a Welcome Wagon, and a state college; and mentions of I&R in church bulletins and sermons.

As a result of all the publicity, the library was inundated with invitations to speak about I&R to various community groups, thus further publicizing the service. The publicity, per se, and speaking engagements seemed to generate cooperation among the various community resources, the public, and the project staff at the libraries.

H. I&R IN THE CONTEXT OF OTHER SERVICES

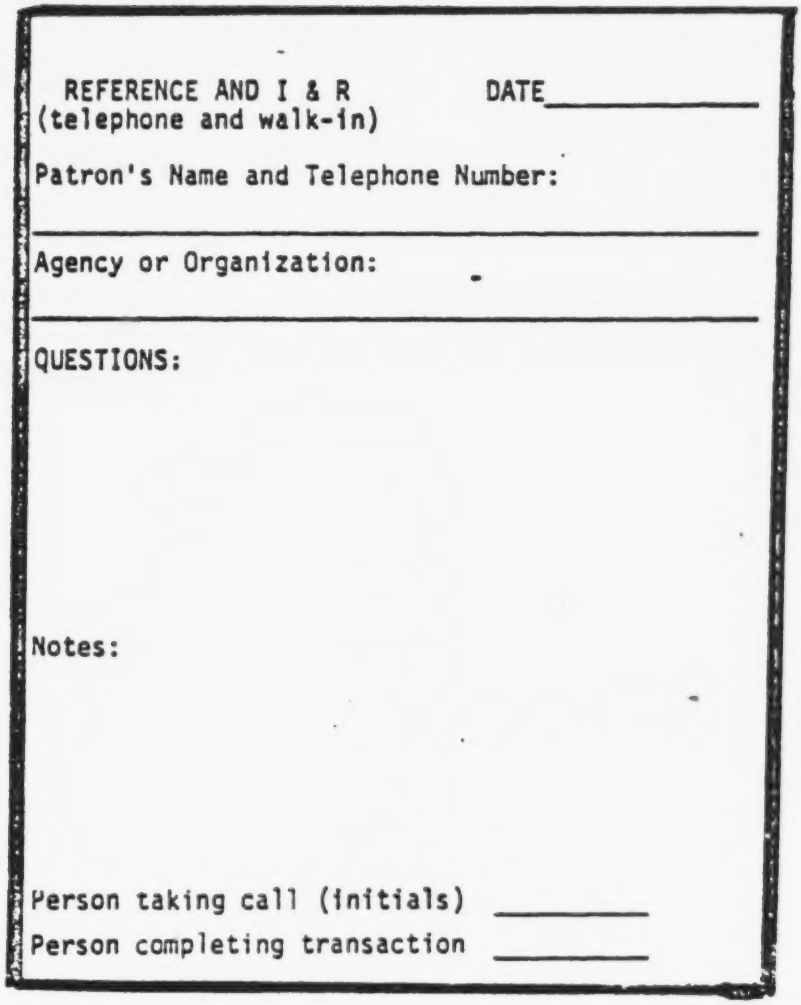
When it started, I&R at CCPL was clearly distinguished from existing library services, mainly because it was funded by grant monies. At first some staff resented the I&R project and its personnel, when it was realized that the community aide was to work strictly on the project and not to assume other duties. However, the resentment waned when the positive reaction of the community to I&R demonstrated the need for it, and as the actual work of I&R became more a part of traditional reference work. Still, the success of I&R has created extra work for all the staff. The people who have worked directly on I&R feel that the regular staff did not understand the time and effort necessary for file development and update. Likewise, there was evidence that the concept of I&R held by the regular library staff was far from consistent. Some staff view I&R as information in the "file" and reference as information in "books." One person said, "I do my best to answer questions and don't worry about whether it's I&R or reference." It would be fair to say that the non-I&R staff as a whole do not have a firm hold on the idea of I&R and the differences between I&R and reference. Moreover, project staff felt that the staff are somewhat resistant to pursuing a question whose answer is not in the library. Despite these apparent disagreements, the total public service staff perceive the library as an appropriate place for I&R and seem to work in general good faith toward the provision of both I&R and reference service.

In CCPL, I&R service provision could be described as centralized and integrated into reference work, with the project staff providing back-up in file development and direct service.

I. EVALUATION

The library collects some data on I&R and reference transactions. A "reference card" is used to record date, patron's name and phone number (if a call back is requested or necessary), agency or organization (if applicable), question asked, notes, and staff member handling the transaction. See Exhibit X-F. The information specialist prepares a monthly "Information and Referral Statistical Report," enumerating the number of questions answered by subject areas. See Exhibit X-G. This report includes I&R and "true reference" questions -- which latter category excludes readers' advisory and directional questions. The library also tallies all questions asked in the library. The total number of I&R questions from August 1979 through July 1980 was 3610. (In 1978-79, the figure was about half: 1591.) The total includes the Federalsburg branch, the Central Library and the bookmobile.

In the opinion of the staff, the public's image of the library has changed dramatically since I&R was introduced. The public now tend more to think of the library as "an information center" and a source of answers, rather than as a warehouse for materials. The director felt that, along with I&R, policy changes in the direction of purchasing more popular periodicals and facilitating the reserving of materials have raised the prominence of the library.



REFERENCE AND I & R (telephone and walk-in)

DATE_____

Patron's Name and Telephone Number:

_____

Agency or Organization:

_____

QUESTIONS:

Notes:

Person taking call (initials) _____

Person completing transaction _____

Exhibit X-F. Reference and I&R Record, Caroline County.

INFORMATION AND REFERRAL STATISTICAL REPORT

BRANCH Caroline County Library MONTH March TOTAL 289

MAJOR SUBJECT AREAS

		TOTAL
AGES & RETIREES	Calendar=1	7
AGRICULTURE		2
ANIMALS		11
BUSINESS/PROFESSIONAL		4
CHILDREN/CHILD CARE		4
COMMUNITY ORGANIZATION	Calendar=7	39
CONSUMER SERVICES		23
EDUCATIONAL & CULTURAL SERVICES		48
EMPLOYMENT/VOCATIONS		12
ENVIRONMENTAL SERVICES		
GOVERNMENT		11
HANDICAPPED		1
HEALTH/MENTAL HEALTH/SEXUAL HEALTH		7
HOME ECONOMICS		13
HOUSING		3
HUMAN RELATIONS/COUNSELING		1
LEGAL SERVICES		13
LICENSES, PERMITS, INSPECTIONS		2
RECREATION & LEISURE		12
RELIGION		9
SOCIAL WELFARE		
SPORTS		4
MISCELLANEOUS	Calendar=1	25
TRANSPORTATION		1
DIRECTIONAL		2

Exhibit X-G. I&R Statistical Report, March 1980. Caroline County

TRANSACTION SURVEY

Between March 6 and July 11 1980, the staff attempted to interview 303 I&R users at the Central Library. They were instructed to collect data on all I&R transactions. The 295 completed and usable interviews probably represent between 90 and 95% of all I&R transactions during that period. The frequencies tabulated from the interviews are displayed on the interview form in Exhibit X-H. The following observations can be drawn from the simple frequencies of the resulting data:

- Agency calls in Caroline County account for a full 20% of all I&R transactions.
- About 65% of the I&R clients claim to have used the service before -- more than at any other site.
- Nonetheless, use of <u>other</u> library services falls into a middle range when compared with other sites: 74%. Yet a substantial percent of these "library users" could be classed as <u>frequent</u> users.
- Close to 2/5 of the I&R clients learn of the service from newspaper publicity, while very few learn of it through the broadcast media.
- Relatively few clients have asked their questions elsewhere before coming to the library (20%).
- Fewer of the youngest people and more of the oldest people ask I&R queries in Caroline County than at most other sites.
- Women constitute almost 4/5 of the I&R clients.
- Consumer matters make up a substantial proportion of query topics. Over 1/4 of the queries could be considered at least in part related to consumer topics. This relates directly to an espoused goal of the LSCA funding period.
- More than at any other site, simple information-giving is the response to an I&R query in Caroline County; complex information-giving is engaged in less than at any other place; and yet referral, as defined for this study, is provided relatively frequently.

Of the many crosstabulations that were run on the transaction data, the following, when subjected to the chi-square test, proved to be significant at the .05 level and seem to help explain how I&R works in the library:

- Agencies are more likely to contact the library on neighborhood issues than on any other single topic.
- Educational topics are more frequently asked about by clients who have used the I&R service before than by other clients.

[X] Agency call (answer only questions 9-12) n = 245

[ ] No response (answer no questions)

PUBLIC LIBRARY INFORMATION AND REFERRAL PROJECT

Branch _____
Date _____
Time _____

We're trying to improve our service. Would you help us by answering a few questions? We won't record your name and it should take only one minute.

1. Have you used the library's information service before -- the one you're using now? n = 239

   [65] Yes [34] No [/] Don't know

2. Have you used any other service of this library system? n = 239

   [74] Yes [26] No [0] Don't know

   IF YES: n = 166

   [2] Was it within past 3 months?
   [15] Was it within past year?
   [3] Was it longer ago? (Or don't remember)

3. How did you learn of the library's information service? n = 238

   [13] Friend, neighbor, relative
   [21] Library staff
   [0] Referred by an agency
   [2] Radio
   [0] Television
   [36] Newspaper
   [17] Other

4. Have you asked your question in any other places before coming to the library? (You don't have to name them.) n = 236

   [36] Yes [64] No

5. I'll read some age groups. Just stop me when you hear yours. [Interviewer: Omit obviously wrong groups when possible.] n = 239

   a[3] 13-19
   b[42] 20-35
   c[17] 36-45
   d[26] 46-64
   e[13] 65 or over
   [.] Declined to state

6. I'll read some groups based on years of education completed. Just tell me when you hear yours. n = 230

   a[22] College graduate
   b[20] Some college
   c[35] High school graduate
   d[6] Some high school
   e[2] 8th grade or less
   [/] Declined to state

7. In which of these groups did your total family income, from all sources, fall last year -- before taxes, that is? I'll read the groups. n = 227

   a[7] Up to $8,000
   b[14] $8,000 to $14,000
   c[26] $14,000 to $20,000
   d[16] $20,000 to $26,000
   e[8] Above $26,000
   [13] Declined to state/don't know

That's all the questions. Thank you very much for your help.

INTERVIEWER TO FILL OUT REMAINDER:

8. Sex of patron n = 231

   [21] Male [79] Female

9. Mode of inquiry n = 272

   [79] Telephone [21] Visit

10. Topic of question (check all that apply) n = 225

    [3] Money matters
    [25] Consumer issues
    [2] Housing/hehld. maint.
    [4] Health
    [9] Job-related issues
    [5] Transportation
    [7] Education
    [15] Neighborhood issues
    [1] Recreation, sports
    [4] Family relations
    [1] Crime & safety
    [4] Legal matters
    [3] Child care
    [2] Other

11. Disposition of question (All that apply) n = 234

    [97] Information was given
    [1] Information was given after interview to probe underlying need
    [1] Librarian contacted a resource on patron's behalf
    [1] Other (Specify)

12. Was question answered (or referral made) from a resource file created by the library? n = 222

    [57] Yes [43] No

Exhibit X-H. Survey results, Caroline County.

Day of the Week: n=272

Sun	0	Thurs	17
Mon	23	Fri	15
Tues	20	Sat	4
Wed	21		

Typology of Education and Income: n=207

Low educ, low income	6
Low educ, hi income	13
Hi educ, low income	44
Hi educ, hi income	37

Exhibit X-H. Survey results, Caroline County (cont.)

- As we might expect, those who are less frequent users of the library's services are more likely to have posed their queries elsewhere.
- Those who learned of the I&R service from library staff tend to have more education than those who learn of it from other sources. This is reinforced in the crosstabulations with the typology.
- People 36 and over, and people in the lower income categories tend to learn about I&R more frequently than others from newspaper publicity.
- People 46 and over, people with queries about money, and women tend more often to have asked their queries elsewhere before coming to the library.
- It is more likely that a housing or household maintenance query will be phoned in than asked in person.
- The staff are more likely to respond with a referral -- as opposed to simple or complex information-giving -- if a query is asked in person .
- For consumer matters, compared with other topics. the staff is less likely to use the library-created resource file; for neighborhood issues, they are more likely to use it.
- For health and job-related queries, compared with other topics, staff seem more inclined to engaged in complex information-giving.

Crosstabulations of the simple variables with the typology yielded no associations with clear meaning, with the exception that they did reinforce the finding above, namely, that clients with more education tend more than other people to have learned of the I&R service from the staff.

REFERENCE ACTIVITY COMPARED WITH I&R

In order to put the I&R activity of the library into some perspective, it is compared here with reference activity for a comparable period. While this comparison cannot, strictly speaking, be expected to hold true for other months and other years, it could be considered indicative of relative activity in these two domains, inasmuch as the period of these observations contained no unusual or "contaminating factors," as far as the staff could tell.

For the period March 6 through July 11 1980, I&R-type questions accounted for 28% of the total of "true reference" and I&R questions. This proportion is the highest of all seven sites. While no one single factor can explain this high percentage of I&R questions, several reasons may contribute:

- This result may be evidence of the need for this service in Caroline County and therefore its actual use.
- In a small operation, the staff may be more alert for I&R queries.
- The CCPL definition of "true reference," may be so narrowly written that the number of reference queries are lower than at other sites and therefore the proportion of I&R to reference is higher.

STAFF ASSESSMENT

The staff's impression is that the public's image of the library since the advent of I&R has grown more positive. I&R has drawn more business of all kinds to the library, and the library is seen as more community-oriented than in the past. As would be expected in a small community, individual contacts in the area have proven most helpful in promoting I&R to the library's public, as well as promoting other, traditional services.

As a whole, resource agencies have shown no opposition or reluctance to cooperate with the library. Those resources that are most cooperative have been the county government and aging agencies. There has been no feedback from agencies on the library's handling of referrals to them. The library director considered the impact of I&R in the library to have been a positive element in selling the library as an information center to the staffs of the various resource agencies and to the funding authority, as well as to the public.

The staff see the major weakness in the I&R service to be the lack of training in content and use of the file. The past and present project staff felt that having a regular library employee in charge of both I&R and reference would facilitate the staff's acceptance of I&R as a regular library service; greater awareness by the non-I&R staff of the work involved in file development and updating would also help.

A general consensus of all staff was that their comstituency wants and needs I&R and that it is likely to continue as a library program for the forseeable future.

ENDNOTES

1. Maryland State Department of Education, To Help You Know: Information and Referral Services for the Residents of Maryland's Eastern Shore. Baltimore: State Department of Education, Division of Library Development and Services, 1979.

2. Maryland Department of Economic and Community Development and Caroline County Economic Development Commission, Community Economic Inventory: Caroline County, Maryland. Annapolis: Maryland Department of Economic and Community Development, Division of Business and Industrial Development, 1978.

3. "The Planning and Demonstration of A Delivery System of Library and Learning Services in Ten County Rural Areas of Oklahoma" (Proposal Number RO 29476); "The Identification of Informational Needs of An American Indian Community That Can Be Met By Library Services" (Proposal Number RO 10622-A); "The Library Community Study of Garrett County;" "Moving Into the Future: A Projective Planning Data Base for the Western Maryland Public Libraries Drawn from Analysis of the Community and Its Information." In Steven M. Mark, Study of Literature and Information Methods Within the Maryland Cooperative Extension Service. College Park : University of Maryland, 1973.

CHAPTER XI

CONCLUSIONS

Althought the intent of Phase II was to describe seven separate instances of public library I&R, the seven cases together support a number of observations, some more tentative than others. By and large such conclusions amount to confirmations of or qualifications on the findings of earlier studies (Phase I, the Neighborhood Information Center Study or Long[1,2]).

THE NATURE OF I&R IN THE LIBRARIES

In all of the sites, I&R must be considered mostly "I" and relatively little "R." The percentage of time the staff actually contact a resource on behalf of a client ("referral") ranges from 1 to 10%. Even at Memphis, where the study team observed considerable negotiation and follow-through, actual referral was negligible. Clients are most often given simple or complex information. This breakout does not in itself distinguish library-based I&R from I&R in other settings. In his study of independent I&R centers serving the aging, Long found that almost 95% of all queries received an "information only" response. There are no data, either objective or subjective, that suggest that library I&R is substantially different from I&R provided in other settings, such as human service agencies or autonomous agencies.

It is of interest that in four sites the staff answer substantially more queries from the library-created resource file than from other sources, such as phone books, published directories, etc. In the remaining sites, however, the library-created file is used much less frequently. The data provide no suggestion of why these differences might occur; but the experience of the study raises our curiousity about such variables as the breadth, or coverage, of the library-generated file; its currency; its depth of information; the ease of using it; the quality and coverage of other files (directories); the range of queries received; patterns of library use; publicity emphases; and characteristics of the population such as size, dispersion, distance from library branchees.

The resource file -- format, fullness of descriptions, access points and currency -- is potentially a major determinant of the quantity and quality of I&R service rendered, but the implications of the file itself are obfuscated by the many other variables that can affect the service provided. In Memphis, where the quantity and quality of I&R are high, the file gets high marks from the staff on format, fullness, access and currency. Yet at Amherst -- also a relatively high quality, high quantity service -- the file is faulted by some staff fairly seriously on its format and access.

There is no indication that the computerization, per se, of the resource file affects the quantity or quality of I&R service. Sites with high quantity and quality of performance -- for example, Memphis and Amherst -- are not computerized. However, Amherst is an apt place for computerization

of files, since the proliferation of various manual resource files and indexes has complicated file control and use. (The potential of the computer was recognized by Amherst staff at the outset of I&R work, but an unfortunate experience with automating has caused them to resort to manual methods.)

Variables other than the file may play larger roles in determining the quantity and quality of I&R performance:

- Confirming the NIC study and Phase I, the indication from the seven cases -- and this may be tautological -- is that a major I&R effort cannot be waged without major commitment from top management. Additionally, the I&R innovation seems to require a human sparkplug to ignite the innovation and inspire the people who will do the I&R work. Coupled with the human elements seems to be the necessity for the organization (i.e., top management) to be willing to rearrange or adjust the priorities of its service program. While there is no indication that any site has actually unseated a traditional service, the more successful sites have made it clear that the I&R effort is a major one and -- at least for the period of initiation -- will be given extraordinary attention.

- In the same vein, managers of the more successful libraries seem to have been committed enough to the innovation to deploy enough resources -- that is, time, since I&R is a labor-intensive effort activity -- to allow the I&R staff to be thoroughly trained, to build a useable file and to spend enough time with the clients to permit full work-up (interviewing) and follow-up.

- The external environment appears to play a role in determining the nature of I&R that develops. To the extent that all of the sites have directed their I&R toward the "general population" from the beginning, it seems that differences among population do not have a major influence on the thrust of the service. For instance, Amherst, with an urbane though somewhat rural populace, offers fundamentally the same kind of service -- thorough, assertive, problem oriented -- offered in Memphis, where large parts of the population have less than average education and income. By way of qualification, it should be pointed out that sub-groups in the population (for example, senior citizens and women) do provide focus for special service or publicity efforts in some of the sites.

- The size of the total service population seems to have relatively little value in predicting the nature of the service that develops.

- The strength of I&R forces potentially competitive with the library's I&R appears to be a more critical environmental variable. The sites with the most assertive library I&R -- Memphis, Amherst, Colorado Springs -- have not had strong systems outside the library for the delivery of I&R. In Dallas and San Mateo the dominance of non-library I&R providers has always been apparent to management. This pattern may help explain the somewhat ambiguous nature of I&R in the latter libraries and, for Dallas, the prominence of the support function, as opposed to direct service.

. It could be hypothesized that the degree of integration/dis-integration of I&R with other library services and the centralization/decentralization of I&R in a library system would be correlated with the quantity or quality of service provided. Drawing from the data of the interviews, the libraries were placed on a two-dimensional matrix of Centralization and Integration. See Exhibit XI-A. The placement of the sites on the matrix suggests that high performers -- Amherst and Memphis -- appear in the Elite quadrant -- indicating that I&R can function at a relatively high level when it is centrally located and not tightly integrated with other services. However, the remaining sites -- high and not so high performers alike -- are scattered around the matrix in such a way that they do not reinforce any pattern.

"I&R" has a variable definition. This is true in the human service sector and in the library sector. In some of the study sites I&R is seen primarily as the service of making a file available to a client and taking from the file -- or letting the client take from the file -- the pieces of information that may be useful. In other sites I&R is seen as helping the client achieve resolution of a need; the file and the information it holds are seen as supportive, albeit vital, to this objective. These two interpretations of I&R may be reflected in the extent of interviewing and follow-up provided by the several site staffs. (Observations on interviewing and follow-up were made irregularly, and solid conclusions cannot be ventured.)

Distinguishing between traditional reference service and I&R is difficult. Distinctions between I&R and reference are confounded by the numerous overlaps in the two services: the people who perform them (often librarians in both cases), the materials used (for example, directories), and the questions asked ("What is the phone number of the Welfare Rights Organization?", for example), and answers given ("895-2494, from 9 to 5 on weekdays"). There is less confusion about the two at sites where the orientation and training of all -- not just I&R -- staff has been more intensive.

USE AND USERS OF I&R IN THE SITE LIBRARIES

It is difficult to characterize the pattern of agency calls to all seven site libraries. In some places the proportion of agency versus individual calls is low -- below 7%. In other places it approaches 20%. At no site does it approach the 50% that Seymour and Layne claim to be the case.[3] One tries to explain differences from site to site via the relationship of the library-based I&R to its external environment: the number of I&R services that agencies may call in preference to the library; the various ways agencies view and use the library's I&R service (as a resource file only, or as a full I&R service). Unfortunately, data collected through the transaction survey and interviews provide no consistent answers.

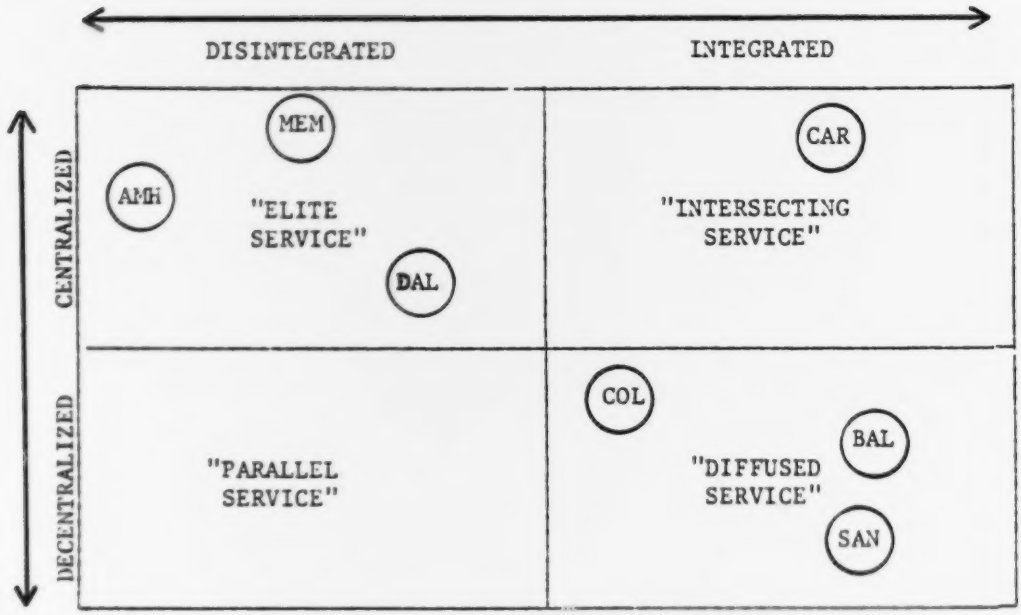


Exhibit XI - A. Matrix of Centralization and Integration

In all but one site -- Amherst -- more than half of the I&R users had "used this service before." Interpreting "this service" to mean the I&R service, it appears that during the periods of the survey between 30 and 70% of the clients had not used the library's I&R service before.

In every site the majority of clients claimed to have used other library services before, and the majority of these "users" could be considered frequent users. Equating clients who used other library service "longer ago than within the past year" with non-users, it could be concluded that somewhere between 21% and 44% of the clients could be considered fundamentally non-users. In some sites the I&R service seems to be attracting substantial numbers of "new" users to the library, confirming the limited findings of the NIC study.[1]

Human contact seems to be the most common channel through which people become aware of the libraries' I&R services. Friends, neighbors, relatives, library staff, agency personnel and other persons are the major conduits by which the client reaches the service. Generally, the media play a much smaller part at the seven sites. Exceptions are Memphis, where television and bus placards (cited under "other") are key promotional devices; and Caroline County, where the newspaper is used heavily. None of the sites enjoyed large publicity budgets; virtually all of the promotion under way at the moment is performed on a shoestring. The closest thing to a publicity "blitz" is found in Memphis, where I&R is continuously advertised through radio, television and bus placards. Even here, the budget is negligible.

With the exception of Amherst, clients tend to have asked their queries first at other places from 20 to 40% of the time. We could expect them to approach the library as a first resort -- that is, as the first place, as opposed to person -- more often than not. Given the way the question was posed, we must assume that clients may have asked persons, especially those in the "friend, neighbor, relative" category, before considering places to ask.

At all sites, the largest single age category of I&R clients is 20-35. To some extent this is an artifact of uneven age categories on the questionnaire. Nonetheless, use by those in the 13-19 and the 36-45 categories is disproportionately low in every site except San Mateo.

In every case, over half the I&R clients claimed to have at least some college education. At every site except Amherst over half of the clients claimed total family incomes of more than $14,000 yearly. Both findings suggest that I&R tends to attract users from the middle and upper socio-economic levels, like other library services. It should be noted, nonetheless, that in some sites -- particularly Amherst, Memphis, Colorado Springs -- substantial numbers of clients are drawn from the lowest category of income, suggesting that I&R can reach poorer and perhaps more disadvantaged groups. (The high proportion of clients in the "up to $8000" class in Amherst may be explained by the "Heatline" -- fuel crisis hotline -- that is part of the library's I&R service.)

The majority of I&R users are women, just as the majority of users of other public library services tend to be women. The suggestion is that women play a key gatekeeper role with regard to information. In every site except two, the vast bulk of I&R queries come in by telephone. In Baltimore County and San Mateo the mix of walk-in and telephone is close to 50-50. The data provide no clue to the reason for this abberation.

I&R can affect the volume of traditional reference service. Partly because it is difficult to distinguish for the public between I&R and reference, I&R publicity invariably increases the volume of reference queries, along with generating I&R queries. Moreover, staff regularly attested to the interlocking nature of reference and I&R, often claiming that the tools of I&R and the techniques acquired in handling sometimes sensitive I&R queries improves reference performance in general.

The range of I&R topics is wide, with few patterns that this study uncovered, except for two unsurprising ones: sports and recreation-related queries are more likely to come from men; family, home and household queries are more likely to come from women.

The attitude of the staff in the site libraries is generally positive toward I&R. It is more positive where there has been more orientation, training, endorsement from the top of the organization and commitment of library resources to I&R.

I&R has served in varying degrees as a focus for innovation in service patterns, in impact on the client group, in organizational structure and in deployment of resources (time or money). In Memphis the innovation moved forward on the grandest scale of any site. In other libraries -- Baltimore County, Amherst, Caroline County and Colorado Springs -- the innovation was less dramatic, but nonetheless substantial, along most of the dimensions above. In the remaining sites -- Dallas and San Mateo County -- the innovation has been quite subtle; comparatively few differences are seen before and after the introduction of I&R.

Endnotes

1. Childers, Thomas. Public Library Information and Referral Project: Phase I, Survey. Final Report. Washington, DC: U.S. Department of Health, Education and Welfare, Office of Libraries and Learning Resources, October, 1979; Childers, Thomas. Third Year Continuation of a [Program to] Research and Design Criteria for the Implementation and Establishment of a Neighborhood Information Center in Five Public Libraries: Atlanta, Cleveland, Detroit, Houston and Queens Borough. Final Report. Washington, DC: U.S. Department of Health, Education and Welfare, Office of Libraries and Learning Resources, November, 1975; and Long, Nicholas. Information and Referral Center Study. Vol. V: Information and Referral Services: Research Findings. Washington, D.C.: U.S. Department of Health, Education and Welfare, Office of Human Development, Administration on Aging, 1975.

2. Long, App. I.

3. Seymour N. Whitney, Jr. and Layne, Elizabeth N. For the People Fighting for Public Libraries. New York: Doubleday, 1979.

APPENDIX A

INTERVIEW QUESTIONS

1. When was the decision made by your library to start an information and referral service?

2. When was the first day you provided direct I&R service?

3. What do you think led your library to do I&R?

MANDATORY PROBE:

a. _another library's experience
b. _a non-library organization
c. _directive from government or funding authority (including trustees)
d. _own formal needs assessment
e. _informal needs assessment
f. _another library's needs assessment
g. _an article or report
h. _other "I&R" type service in the community
i. _professional exposure at conferences (formal/informal)
j. _other::

4. Within the organization, who provided the major impetus to undertake I&R?

PROBE: _Director
_Staff: position: name:
_Trustee: name:
_Other: position: name:

5. Why did you personally get into I&R?

6. To what extent have you been in on I&R in this library?

7a. Did your library experience any <u>start-up costs</u> in preparing for I&R services?

_No _Yes

7b. Did financial support for start-up come from inside the Library's regular source of income?

_No _Yes::

_Separate budget line
_Absorbed in other budget line(s)::
_Other::

7c. Did financial support for start-up come from outside the library's regular source of income?

PROBE: USOE, HEW, United Way, State Library, private foundation, community organization

_No _Yes: DESCRIBE:

7d. What was the amount of start-up costs?

PROBE: best guess

8. In starting up I&R, did your library receive outside assistance other than money?

PROBE: volunteer workers, another agency's "I&R" file, help in training staff, help in developing I&R procedures, publicity

_No _Yes: DESCRIBE

8a. To what extent has the community been involved in your I&R project?

9a. To what extent is your I&R service actually serving 1 or more sub-groups?

PROBE:

_Senior citizens
_Children and youth
_Disadvantaged:: DESCRIBE
_Mentally handicapped
_Physically handicapped
_Students
_Veterans
_Women
_Other::

9b. Was it designed to do so?

9c. To what extent does your service serve the socially or economically disadvantaged? (excluding aging, handicapped)

10. Does the staff provide the inquirer with the asked-for information on outside resources such as phone numbers, addresses, contact persons, etc., without further probing? (Simple information giving)

1. Regularly provided as a standard service.
2. Not a standard service;up to the staff member.
3. Not provided at all.
4. Library plans to do on a regular basis. (Give approximate date.)

11. Does the staff give the same information as above, after clarifying the inquirer's real and underlying need? (Complex information giving.)

1. Regularly provided as a standard service.
2. Not a standard service; up to the staff member.
3. Not provided at all.
4. Library plans to do on a regular basis. (Give approximate date.)

12. Does the library itself construct a file of outside resources? (File)

1. Regularly provided as a standard service.
2. Not a standard service; up to the staff member.
3. Not provided at all.
4. Library plans to do on a regular basis. (Give approximate date.)

13. Does the staff actively help the public make contact with an outside resource, by making an appointment for him, calling an agency, etc.? (Referral)

1. Regularly provided as a standard service.
2. Not a standard service; up to the staff member.
3. Not provided at all.
4. Library plans to do so on a regular basis. (Give approximate date.)

14. Provide evaluations to the client of the outside resources that are available? (Advise-resources)

1. Regularly provided as a standard service.
2. Not a standard service; up to the staff member.
3. Not provided at all.
4. Library plans to do so on a regular basis. (Give approximate date.)

15. Help the inquirer choose a course of action to reach needed resources. (Advise-strategy.)

1. Regularly provided as a standard service.
2. Not a standard service; up to the staff member.
3. Not provided at all.
4. Library plans to do so on a regular basis. (Give approximate date.)

16. Make sure the inquirer has reached the proper outside resource, or gotten the proper help. (Follow-up)

1. Regularly provided as a standard service.
2. Not a standard service; up to the staff member.
3. Not provided at all.
4. Library plans to do on a regular basis. (Give approximate date.)

17. Work to overcome obstacles that the inquirer encounters in trying to secure help from outside resource agencies. (Advocacy)

    1. Regularly provided as a standard service.
    2. Not a standard service; up to the staff member.
    3. Not provided at all.
    4. Library plans to do on a regular basis. (Give approximate date.)

18. From the insights or data gained through providing reference/ information services, provide formal feedback on social service needs to politicians, planners, social agencies, etc.? (Feedback)

    1. Regularly provided as a standard service.
    2. Not a standard service; up to the staff member.
    3. Not provided at all.
    4. Library plans to do so on a regular basis. (Give approximate date.)

19. Help the client work out personal problems (without necessarily using outside resources); requires deep probing of a complex personal situation such as alcoholism, emotional crises, family disputes, etc. (Counselling)

    1. Regularly provided as a standard service.
    2. Not a standard service; up to the staff member.
    3. Not provided at all.
    4. Library plans to do on a regular basis. (Give approximate date.)

20. Provide transportation (not simply arrange for) for the public to outside resources. (Transportation)

    1. Regularly provided as a standard service.
    2. Not a standard service; up to the staff member.
    3. Not provided at all.
    4. Library plans to do on a regular basis. (Give approximate date.)

21. Provide (not simply arrange for) someone to accompany an inquirer to outside resource. (Escort)

    1. Regularly provided as a standard service.
    2. Not a standard service; up to the staff member.
    3. Not provided at all.
    4. Library plans to do on a regular basis. (Give approximate date.)

22. Identify any other service provided as a regular I&R service.

23. Pick out the top five you do most frequently and rank them.

24. To what extent was any of the above services going on before I&R was instituted?

    PROBE: simple information-giving, complex information-giving, referral

25. Has your library worked with other agencies? Has the library:

Helped compile a resource file (or directory) that is distributed to non-library agencies for their I&R work?	_NO _YES
Assisted another agency in setting up a resource file?	_NO _YES
Assisted another agency in collecting information on resource agencies for its resource file?	_NO _YES
Convened meetings of I&R providers in your region?	_NO _YES
Worked with another agency in seeking funding for I&R in your region?	_NO _YES
Published a joint I&R newsletter?	_NO _YES
Done other things to support I&R activities, other than direct services. Please specify:	_NO _YES

26. How many library branches in your system offer <u>full</u> I&R service?

_All, including main
_Main only
_Specially designated branches
_Other::

27. What kind of access is there to your I&R service: phone, inperson, computer terminal, cable TV, other?

28a. Are there any special telephone arrangements for I&R?

_Separate phone line
_Three-way phone:: percentage of use:
Which outlets::

28b. If no, is it desirable?

29. Where on the organization chart do you fit?

30. The clearinghouse staff (if applicable)?

31. What I&R statistics do you keep?

_Number of I&R queries (as distinct from other queries)
_Topics of queries
_Number of referrals
_Number of referrals to each agency
_Amount of time spent on each transaction
_Walk-in users
_Phone-in users
_Number of follow-ups
_Percent of all queries followed-up
_Education level of users
_Income level of users
_Sex of users
_Other::

NOTE: Will need these statistics

32a. Do you cooperate formally or informally with any other libraries or non-library agencies?

_No _Yes:: DESCRIBE

32b. How important is the network in I&R service?

33. Does the library itself construct a file of outside resources?

_No _Yes _Other::

34. When did the library begin assembling a Resource File?

35. Who had the initial responsibility for the Resource File development?

People, ranks, and location in organization

36. What library staff developed File initially?

37. How much time did each person spend on it?

38. Where is the Resource File available in the system?

_Main library only
_Main and all branches
_Specially designated branches
_Other::

39. Where is the Resource File located in the library?

_Reference desk(s)
_Special desk
_Card catalog
_Other::

40. What is the format of the File?

_Index cards
_Printed or photocopied in looseleaf form
_Printed or photocopied in bound form
_Computerized, on-line
_Printed, microfiche form
_Printed, microform
_Other::

40a. Is that the only form of the File?

41. How is the main File arranged?

PROBE:

_Alpha by provider
_Alpha by subject, and then by provider
_Geographically, and then by provider
_Segment of the population (target groups)
_By need or problem
_Other::

42a. Is there an index to the Resource File?

_No _Yes:: DESCRIBE::

42b. How is the index arranged?

43. Is the File cross-referenced?

_No _Yes:: HOW?

44. Is there access to resources by

_Name of agency
_Topic of need or service
_Geographic are
_Other::

45. What are the influences for the indexing and arrangement of the File?

PROBE: modeled on another library's file, a standard text (Sears)

46. Information about resource agencies that you try to put into the File:

_Name of resource agency
_Address
_Phone number
_Description of services or activities
_Name of person to contact
_Title of person to contact
_Name of person in charge
_Title of person in charge
_Type of service (federal, state, local, private)
_Source of financial support
_Hours of service
_Geographic area served
_Eligibility requirements
_Qualifications of the staff
_Evaluation of the service by the library staff
_Physical accessibility of the agency (ramps, parking, public transportation)
_Service capability/availability of services
_Meetings of or sponsored by the agency
_Goal or purpose of resource agency
_Methods of obtaining service
_Speakers available
_Published materials available
_Organization chart
_History of the resource agency
_Subject headings and "see also" references
_Terms of office and frequency of rotation of officers
_Other::

47. Have resource agencies cooperated in compiling the File?

_No _Yes: How?

48. Are "files" other than this Resource File used in I&R service?

PROBE: Yellow Pages, human services directories, government directories (local, state, federal)

_No _Yes::
NAME::

49. How do you identify agencies to put into the Resource File?

PROBE:

_Newspaper
_Radio
_TV
_Other agencies
_Other::

50. How do you collect data that you put into the Resource File?

_Telephone
_In person
_Questionnaire
_Second-hand information
_Other::

51. What kind of resources are <u>now</u> included in the File?

_Churches
_Clubs/Associations
_Entertainment/Recreation
_For-profit organizations (second-hand clothing stores)
_Non-profit organizations (Thrift shops, Salvation Army)
_Government services
_Information, per se, ready reference (altitude of Cheyenne, excerpts from legal statutes)
_Political organizations (Civic org., political org.)
_Service agencies
_Other::

52. How many entries did the File contain when you first started offering I&R service?

53. What is the size of the File now?

54. How often is the File updated? (multiple answers allowed)

_About one time a year
_About two times a year
_About three times a year
_Every two years
_As need arises
_Don't know
_Other::

55a. How do you update?

PROBE: phone, library mail-outs, in person, computer, etc.

55b. Who initiates the updating?
_I&R staff
_Agency staff
_Library clearinghouse
_Non-library clearinghouse
_Other::

56. Has the File itself changed as it has grown and developed?

PROBE: expansion, direction, new types of resource agency

_No _Yes:: (Please elaborate)

57. When a typical I&R query comes into a branch, how is it handled -- from intake to delivering the final answer?

PROBE: steps

58. How many resources are given for a typical I&R query?

PROBE: all applicable ones, one best

58x. How long does it take you to answer an I&R query? (in minutes)

58y. How long does it take you to answer an average reference question? (in minutes)

59. How many entries in the File have you never used?

PROBE: best guess

60. Have you used the Resource File for anything other than I&R?

61. Can the File be used by the public directly?

_No _Yes _Other::

62. Is the File available to other agencies?

_No _Yes: Which:: PROBE: other libraries, agencies, organizations, planning agency, agency not doing I&R

63. If the File is available to other agencies, libraries, etc., what is the format of the information given to them?

_Pages
_Cards
_Microform::
_Computer printouts
_Typed list
_Other::

64. If the File is available to other agencies, libraries, etc., is there a charge to the agency?

_No _Yes::_____

65. In your opinion, what is the adequacy of the Resource File?

	Very Good			Very Bad	
Subject scope	1	2	3	4	-- WHY?
Currency	1	2	3	4	-- WHY?
Depth of information on agencies	1	2	3	4	-- WHY?
Arrangement of main File	1	2	3	4	-- WHY?
Indexing -- adequacy of access	1	2	3	4	-- WHY?
Format -- physical structure	1	2	3	4	-- WHY?

66. Who does I&R in your library?

PROBE:	FT	PT	Hours/week JUST I&R
_Regular adult services staff	__	__	_____
_Regular children's staff	__	__	_____
_Regular young adult staff	__	__	_____
_Regular reference staff	__	__	_____
_Regular library associate	__	__	_____
_Regular clerical staff	__	__	_____
_No one, I&R is self-service	__	__	_____

_Other:

67. Do you have any special "I&R only" staff?

_No _Yes::

How many? Rank?

68. What percent of a typical I&R person's time is spent dealing with I&R (vs. other library activities)?

69. Enumerate your I&R staff and their background -- education and experience: rank, full time/part time, library training, I&R training and experience, human services training and experience.

70. What education or experience does a direct I&R provider need in order to do adequate I&R work?

71. What education or experience does a back-up I&R provider need in order to do adequate I&R work?

72. What is the most useful attribute for a direct I&R provider?

73. What kind of introduction to or training for I&R has the library sponsored for the staff?

DESCRIBE: type of introduction/training and which staff it was directed to

74. Was there orientation for the whole staff?

__No _Yes

75. How do you define I&R as different from reference?

76. Is the line clear? To you? To others?

77. If a client had a question on

> Who is my U.S. Representative and where can I write to him or her?
>
> I want to return a pair of jeans to Levi Strauss, where do I send them?
>
> Where can I buy fresh mushrooms from a mushroom farm?
>
> Would they be getting I&R or reference service?

78. When do you refer clients to the central I&R service?

79. Do you produce an internal (within library only) or external (distributed outside library) I&R newsheet?

80. Frequency?

81. Are there regular meetings of the I&R staff?

_No _Yes:: Frequency:_____

82a. Are there any meetings with I&R providers and resource people outside the library?

_No _Yes DESCRIBE::

82b. Frequency?

83. For funding of ongoing I&R, is there a

_Separate line in the budget
_Absorbed by lines:
_Other::

84. Is there ongoing financial support from outside the library's regular source of income?

_No _Yes:: identify source(s)

PROBES: State library agency, USOE, HEW, United Way, private foundation, community organization

85. What is the amount of funding for ongoing I&R activities in the last two years?

_This year (current)_____
_Last year_____
_Don't know

PROBE: best guess

86. How was I&R announced to the public initially?

_Alone
_With other services
_With special name::

87. What kind of initial publicity was there inside the library?

_Flyers
_Posters, signs
_Bookmarks
_Programs
_Staff
_Brochures/Booklets
_Other::

EXAMPLES:

88. What kind of initial publicity was there outside the library?

_Newspapers, spots or ads
_Radio, spots or ads
_TV, spots or ads
_Flyers, brochures
_Posters or placards
_Billboards
_Personal contact by library staff
_Other::

EXAMPLES!!!

89. Who was in charge of the initial publicity?

_____

Rank:
Position:

90. Were initial publicity costs defrayed out of regular library revenues or did they come from special funds?

_Regular library revenues
_Special funds::_____

91. What were the costs of initial publicity?

PROBE: best guess

92a. Since the initial publicity, has there been any ongoing publicity?

_No _Yes

(if "No" go to #111)

92b. How has it differed from initial publicity?

PROBE: Format, frequency, money

93. What have been the most effective forms of publicity?

94. Describe the reaction of the public to the library's I&R service.

PROBE: praises, complaints, problems with resource agencies

95. Looking at the use of all the library's services, how significant is the use of I&R?

Significant 1 2 3 4 Not significant

96. How does I&R in the library complement or duplicate other "I&R" type services in the community?

PROBE: even in health and welfare

97. In your opinion, how do resource agencies react to the library's I&R service?

98. How often do agencies refer clients to the library's I&R service?

99. Has the public's view of the library changed since I&R?

PROBE: library's role; awareness of library and its services

100. How has I&R affected the library politically?

PROBE: city fathers/funding authority

101. In your opinion, does the professional staff as a whole feel that I&R is appropriate for the library to do?

PROBE:
+ 1 2 3 4 -
[_____]
Why not #1?

102. To what extent do you feel that I&R is an appropriate library job?

MANDATORY PROBE: + 1 2 3 4 5 -

103. How do you regard the I&R job compared to other jobs in the library?

PROBE: below, above other jobs

104. Has there been any "burn-out" among I&R staff?

105. Have there been any changes in the service since the beginning?

PROBE: direction of service, file format, file information, phone lines, added equipment

_No _Yes::

106. If you were forced to cut a service, which one would you cut?

__I&R _Traditional book-based reference services

WHY?

_I&R _Program events (demonstrations, talks, showings, story hours, etc.)

WHY?

_I&R _Interlibrary loan (outside the library system)

WHY?

107. Do you think I&R should be in every library branch?

_No _Yes

WHY?

108. What do you think are the major problems in your library's I&R service?

109. Considering the current state of I&R in your library, what would you like to see happen?

REFERENCE LIBRARIAN WHO DOES NOT DO I&R

A1. Have you added any additional local information to the Resource File?

A2. On the organization chart, what is the relationship between you and the head of I&R?

A3. How close are you to the day-to-day operation of I&R?

A4. Would you like to do I&R work?

A5. If the head of I&R left, could you take over I&R and run it?

A6. Would reference and I&R profit or suffer if the two services were brought together?

BRANCH LIBRARIAN WHO DOES NOT DO I&R

B1. Are you aware that I&R is going on in the library?

B2. How does it affect you and your job?

B3. What is the relationship between reference and I&R?

B4. Do you ever refer clients to the I&R service?

B5. Are there any changes in I&R that you would like to see?

RESOURCE AGENCIES

R1. A "test": Do you know the name of the library's I&R service?

R2. What is your agency's relationship to that service?

R3. Do you always know when the library sends people to you?

R4. How many known referrals have you had from the library in the past year?

R5. In how many of those cases (%) has the library staff contacted you directly with regard to a case?

R6. Do you feed information back to the library about cases they have referred to you?

R7. Do you ever refer people to the library's I&R service?

R8. Have you done any work with the library related to I&R, such as building resource files, meetings, newsletters, etc.?

R9. Of all referrals that you receive, are the library's distinctive in any way?

PROBE: accuracy, completeness of information given, topics, type of client

R10. What is the major I&R service in the area?

IF ANSWER "LIBRARY," BEFORE the library's I&R service?

R11. How do you think other human service agencies regard the library's I&R service?

___ Agency call (answer only questions 9-12)

___ No response (answer no questions)

TRANSACTION SURVEY FORM

PUBLIC LIBRARY INFORMATION AND REFERRAL PROJECT

Branch _____
Date _____
Time _____

We're trying to improve our service. Would you help us by answering a few questions? We won't record your name and it should take only one minute.

1. Have you used the library's information service before -- the one you're using now?

   [ ] Yes [ ] No [ ] Don't know

2. Have you used any other service of this library system?

   [ ] Yes [ ] No [ ] Don't know

   IF YES:

   [ ] Was it within past 3 months?
   [ ] Was it within past year?
   [ ] Was it longer ago? (Or don't remember)

3. How did you learn of the library's information service?

   [ ] Friend, neighbor, relative
   [ ] Library staff
   [ ] Referred by an agency
   [ ] Radio
   [ ] Television
   [ ] Newspaper
   [ ] Other

4. Have you asked your question in any other places before coming to the library? (You don't have to name them.)

   [ ] Yes [ ] No

5. I'll read some age groups. Just stop me when you hear yours. [Interviewer: Omit obviously wrong groups when possible.]

   a[ ] 13-19
   b[ ] 20-35
   c[ ] 36-45
   d[ ] 46-64
   e[ ] 65 or over
   [ ] Declined to state

6. I'll read some groups based on years of education completed. Just tell me when you hear yours.

   a[ ] College graduate
   b[ ] Some college
   c[ ] High school graduate
   d[ ] Some high school
   e[ ] 8th grade or less
   [ ] Declined to state

7. In which of these groups did your total family income, from all sources, fall last year -- before taxes, that is? I'll read the groups.

   a[ ] Up to $8,000
   b[ ] $8,000 to $14,000
   c[ ] $14,000 to $20,000
   d[ ] $20,000 to $26,000
   e[ ] Above $26,000
   [ ] Declined to state/don't know

That's all the questions. Thank you very much for your help.

INTERVIEWER TO FILL OUT REMAINDER:

8. Sex of patron

   [ ] Male [ ] Female

9. Mode of inquiry

   [ ] Telephone [ ] Visit

10. Topic of question (check all that apply)

    [ ] Money matters
    [ ] Consumer issues
    [ ] Housing/hshld. maint.
    [ ] Health
    [ ] Job-related issues
    [ ] Transportation
    [ ] Education
    [ ] Neighborhood issues
    [ ] Recreation, sports
    [ ] Family relations
    [ ] Crime & safety
    [ ] Legal matters
    [ ] Child care
    [ ] Other

11. Disposition of question (All that apply)

    [ ] Information was given
    [ ] Information was given after interview to probe underlying need
    [ ] Librarian contacted a resource on patron's behalf
    [ ] Other (Specify)

12. Was question answered (or referral made) from a resource file created by the library?

    [ ] Yes [ ] No

tc 1.80

5.

a( ) 13 to 19
b( ) 20 to 35
c( ) 36 to 45
d( ) 46 to 64
e( ) 65 or over

6.

a( ) College graduate
b( ) Some college
c( ) High school graduate
d( ) Some high school
e( ) 8th grade or less

7.

a( ) $8,000 or below
b( ) $14,000 or below
c( ) $20,000 or below
d( ) $26,000 or below
e( ) Above $26,000

APPENDIX C

INSTRUCTIONS...FOR...TRANSACTION SURVEY

INSTRUCTIONS TO LIBRARY STAFF FOR PUBLIC LIBRARY INFORMATION AND REFERRAL PROJECT TRANSACTION SURVEY

* A brief introductory speech for the library staff members appears at the top of the form. Stress that all replies will be anonymous (even if the patron gives his or her name during the transaction). If it helps, assure the patron that questions on personal background (age, education, income) are standard in many surveys and polls, and that answers are wanted only in terms of the broad categories given rather than exact numbers. Of course, the option to answer is always the patron's, but the better the response rate, the clearer our picture of what's going on.

* Gather data on Information & Referral (I&R) transactions only.

* An I&R transaction involves giving patrons information about resources outside the library (except other libraries). It may also involve steering (directing) patrons to these resources, or actually making contact with a resource on the patron's behalf. The ultimate purpose is to help link people to resources.

* Usually an I&R transaction will involve use of a resource file, or community information file, but it may also involve other directories. (e.g., Yellow Pages). I&R is not simply transmitting how-to information ("how to build a widgit") or historical information (when was Lincoln president?") and so on, unless that information is helpful in linking the client with a needed resource.

* Examples of resources outside library: community agencies (such as those supported by United Way), counsellors, recreation programs, educational programs, consumer information agencies, government departments, businesses, clubs, individuals.

* If an I&R patron calls on the telephone, the library staff member should read questions 1 to 7 as written and check off the appropriate responses.

* If an I&R patron visits in person, the library staff member should likewise read the questions, ask the patron to read off the appropriate letter from the back of the form for questions 5, 6, and 7 and check off responses (rather than give the form to the patron to fill out). This will insure a maximum of usuable replies.

* If agency call, check "agency call" and answer only questions 9-12. Count it as one of your sample.

* If no response to any question, check "no response." Do not answer any questions. Add date and time. Do not count as one of the sample, but do turn it in.

APPENDIX D

TRANSACTION SURVEY FREQUENCIES

	AMHERST	BALTIMORE COUNTY	CAROLINE COUNTY	DALLAS	MEMPHIS	COLORADO SPRINGS	SAN MATEO
Agency calls	19%	7%	20%	21%	12%	7%	5%
1. Used this service before	31	67	65	51	62	50	60
2. Used other library services	86	86	74	74	76	60	65
within past three months	70	68	82	57	65	75	66
within past year	18	23	15	25	25	18	23
longer ago	12	9	3	17	10	7	10
3. Learned of this service from							
friend, neighbor, relative	14	22	13	20	19	24	21
library staff	6	30	29	9	10	14	49
referred by agency	39	4	6	13	14	11	4
radio	2	4	2	10	10	1	0
television	1	6	0	3	27	2	1
newspaper	12	6	38	13	5	2	1
other	31	34	19	36	23	52	25
4. Asked question elsewhere	53	31	20	39	38	35	29

	AMHERST	BALTIMORE COUNTY	CAROLINE COUNTY	DALLAS	MEMPHIS	COLORADO SPRINGS	SAN MATEO
5. Age							
13-19	4	12	3	4	7	5	11
20-35	74	47	42	55	52	52	29
36-45	14	16	15	21	12	20	18
46-64	7	20	26	15	23	17	22
65 & over	2	4	13	5	5	5	14
declined to state	0	0	0	0	0	7	6
6. Education completed							
college graduate	45	32	32	43	29	36	33
some college	33	29	20	35	30	30	26
high school graduate	12	25	35	16	23	26	20
some high school	4	10	10	5	11	5	12
8th grade or less	1	2	2	1	6	2	5
declined to state	5	0	1	1	1	2	4
7. Total family income							
up to $8,000	39	10	7	9	23	22	10
$8,000-$14,000	26	13	35	20	21	25	19
$14,000-$20,000	12	24	26	20	16	21	14
$20,000-$26,000	6	18	10	16	13	12	11
above $26,000	9	24	8	28	16	13	22
declined to state	10	13	13	7	12	7	25
6-7. Typology							
low educ, low income	9	7	6	3	17	10	5
low educ, hi income	1	10	13	3	4	7	8
hi educ, low income	62	20	44	28	32	40	32
hi educ, hi income	28	63	37	66	47	43	55

	AMHERST	BALTIMORE COUNTY	CAROLINE COUNTY	DALLAS	MEMPHIS	COLORADO SPRINGS	SAN MATEO
8. Sex							
male	25	33	21	27	28	29	47
female	75	67	79	73	72	71	53
9. Mode of inquiry							
telephone	89	51	79	93	98	86	44
visit	11	49	21	7	2	13	56
both	0	0	1	0	0	1	0
mail	0	0	0	0	1	0	0
10. Topic of question							
money matters	10	10	8	4	8	6	16
consumer issues	3	8	28	5	2	13	8
housing/hshld. maint.	9	4	6	2	5	4	6
health	38	8	9	4	15	4	9
job-related issues	9	14	9	16	9	13	11
transportation	2	2	3	2	3	3	3
education	7	17	7	16	10	12	12
neighborhood issues	5	3	15	5	1	3	13
recreation, sports	3	9	11	26	10	9	7
family relations	6	3	4	7	3	2	21
crime & safety	1	0	1	1	1	2	2
legal matters	7	10	9	4	11	3	11
child care	8	4	3	1	2	1	4
other	17	24	13	28	32	35	12
11. Disposition of question							
info given	80	77	97	79	83	87	92
info given after probe	19	10	9	19	20	13	28
librarian contacted resource	2	8	9	1	4	3	10
other	2	11	4	3	4	1	2

	AMHERST	BALTIMORE COUNTY	CAROLINE COUNTY	DALLAS	MEMPHIS	COLORADO SPRINGS	SAN MATEO
12. Question answered from library resource file	97	65	57	89	94	44	92
CIP							5
Inforama							2
other							2
Day of the week							
Monday	30	46	23	19	21	25	23
Tuesday	18	24	20	21	32	18	24
Wednesday	8	10	21	24	28	12	20
Thursday	26	7	17	20	14	20	12
Friday	17	4	15	11	0	16	9
Saturday	1	7	4	4	5	8	10
Sunday	1	2	0	1	0	1	0

NOTE: Percentages between .5 and 1.0 are reported as 1%; therefore, the total of percentages may be one or two points higher than 100.

APPENDIX E

SCHEDULE OF SITE VISITS AND SURVEY DATES

SITE	SITE VISIT	SURVEY PERIOD
Baltimore County	Nov. 19-20, 1979	Jan. 7, 11, 15, 21, 29 Feb. 9, 24, 28 April 14-17
Amherst	Jan. 7, 1980	Jan. 8 - July 11
Memphis	Jan. 14-16, 1980	Jan. 21, 29 Feb. 9,28 March 12, 18, 26
Dallas	Feb. 11-13, 1980	Feb. 18 - June 24
Colorado Springs	Feb. 25-27, 1980	Feb. 28 - May 28
Caroline County	March 3-4, 1980	March 6 - July 11
San Mateo	March 10-12, 1980	March 17 - June 10

APPENDIX F

PERSONS INTERVIEWED

AMHERST

Anne M. Turner	Director
Diane Welter	Human Services Coordinator (Direct Information Service)
Catherine Bennett	Information Systems Consultant (DIS)
JoAnn James	Human Services Analyst (DIS)
Pauline Peterson	Head, Reference Department
Catherine Gannon	Adult Services Librarian
Shirley Anderson	Branch Librarian, North Amherst Branch

BALTIMORE COUNTY

Charles W. Robinson	Director
Jean Barry Molz	Assistant Director
Elliot Shelkrot	Chief of Public Services Support
Beth Babikow	Coordinator, Information and Programming Services
Carolyn Anthony	Head, Information Services
Lou Grumbach	Supervisor, Information Services Clearinghouse
Marlene Kuhl	Information Services Clearinghouse
Milt Dutcher	Branch Librarian, Randallstown Branch
LaVerne Brown	Head, Resources Management, Northpoint Branch
Debby Wong	Head, Information and Programming, Parkville-Carney Branch
Ronald Fink	Library Associate, Rosedale Branch
Jennifer Haire	Assistant to Head of Information and Programming, Cockeysville Branch
Gladys Molesworth	Library Associate, Reisterstown Branch
Peggy Peterson	Library Associate, Catonsville Branch

CAROLINE COUNTY

George Sands	Director
Julianne McCauley	Librarian, Information Services and Reference (until 11/79)
Penny Danish	Information Specialist (until 2/80)
Jane Maloney	Information Specialist
Patricia Reinhardt	Library Associate, Central Library Supervisor
Donald Bayne	Library Associate, Reference
Maxine Joiner	Library Assistant, Technical Services
Margaret Fisher	Library Associate, Bookmobile
Phyllis Triggs	Librarian, Reference (part-time)
Sheran Turner	Library Associate, Interlibrary Loan
Josephine Corwin	Library Associate, Federalsburg Branch
Claire Stevens	Librarian, Reference (part-time)
Janet Taylor	Library Assistant, Circulation

COLORADO SPRINGS

Kenneth Dowlin	Director
Lynn McGrath	Assistant Director for Public Services
Vivian Hurley	Head, Information Services
Cindy Slater	Librarian, Information Services
Shelley Watts	Librarian, Information Services
Duane Thomas	Administrative Assistant, Information Services
Judy Vanhoffman	Head, Reference Department
Mary Kay Carlson	Librarian, Reference Department
Judith Yem Michali	Librarian, Reference Department
Bonnie Gerken	Head, Children's Services
Lorna Byrd	Eastern Area Librarian
Annie Soltis-Stolz	Western Area Librarian
Bob Roberts	Branch Librarian, Calhan Branch
"Matt"	Terros-Hotline
Carol Markewich	Community Health Center
Anne Warner	Community Food and Nutrition

DALLAS

Lillian Bradshaw	Director
Richard Waters	Associate Director
Ralph M. Edwards	Chief, Central Library
Linda Allmand	Branch Chief for Branches (until 2/8/80, then, Chief, Physical Facilities Planning)
Margaret Warren	Librarian for Service Evaluation and Grants
Louise Swanteson	Community Information Librarian (APL/CAT)
Wayne Gray	Head, General Reference Division
Randall Couch	Library Associate, Reference Division
Mary Lynn Rice-Lively	Library Associate, Reference Division
Aletta Scuka	Library Associate, Reference Division
Sarabeth Sullivan	Head, Business and Technical Division
Mirian Waite	Librarian, Business and Technical Division
Alilire Kratz	Education Specialist, History and Social Sciences Division
Mary Lee Barliosa	Branch Manager, Skyline Branch
Joyce Campbell	Branch Manager, Lancaster-Kiest Branch
Harriet Mador	Branch Manager, Casa View Branch
Jon Maltzan	Branch Manager, Walnut Hill Branch
Mary Todd	Branch Manager, Polk Wisdom Branch

MEMPHIS

Lamar Wallis	Director
Robert Croneberger	Deputy Director
Robert F. Smith	Chief of Main Library
Carolyn Luck	Head of LINC Department
Jan Neal	First Assistant, LINC Department
Mary Ann Brondi	Librarian, LINC Department
Nancy Colbert	Librarian, LINC Department
Bunny Andrews	Library Assistant, LINC Department
Sallie Johnson	Head of Sciences, Business and Social Sciences Department
Joyce Wright	Head of Magazines and Newspapers Department
Gerry Brown	Branch Librarian, Germantown Branch
Richard Childers	Branch Librarian, Raleigh Branch
Maxine Strawder	Branch Librarian, Gaston Park Branch
Dorothy Carr	Adult Services Librarian, Whitehaven Branch
Margaret Childers	Children's Librarian, Randolph Branch
Linda Brasfield	University of Tennessee, Continuing Education
Cara Davis	Memphis Mental Health Institute
Deborah Elay	Kelly Health Care
Joanne Kahane	Forget-me-not agency
Mary Smith	Department of Human Services

SAN MATEO

Jean Davis	Director
Nancy Lewis	Deputy Director
Anna Scott	Reference Coordinator for SMCPL
Jane Irby Light	Director, Peninsula Library System
Carol Yamamoto	Director, Community Information Project
Sally Jo Carey	Reference Librarian, San Carlos Branch
Jan Engel	Branch Chief, Pacifica-Sanchez Branch
Delores Gomez	Library Assistant, Brisbane Branch
Carol Jenkins	Branch Chief, Woodside and Portola Valley Branches
Shirley Sampson	Library Assistant, Portola Valley Branch
Ann Lane	Librarian, Belmont Branch
Warren Netz	Branch Chief, Millbrae Branch
Mike McNamara	Children's Librarian and Reference, Millbrae Branch
Bonnie Bowing	Social Worker, Resource Staff
Sue Adwell	Fair Oaks Community Center
Joe Malone	Planner and Program Director, Economic Opportunity Commission of San Mateo, Inc.
Mary Radu	Coordinator, Human Services Department